DCPDS
(Web-Based Version – Oracle 11i)
Quick Start Guide

Overview

Introduction

This guide explains the initial steps to navigate Oracle 11i, the web-based version of DCPDS. New features in 11i include:

- Required fields are highlighted.
- List of Values (LOVs) are embedded with the data fields.
- Date format allows for free form entry, which is automatically converted to the correct system format.
- Tabs have replaced many flexfields.
- A **Person Summary** for viewing all the employee data.
- A **Position History** for viewing changes to the position record.
- Less down time – no client loads for patches.

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Overview, Continued

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Overview, Continued

See Also

Modern DCPDS User Guide posted on the DoD CPMS Home Page for specific processing details.

Before You Begin

- Obtain a User Name.
- Set up your secure password.
- Ensure you are:
  - Assigned to a routing group.
  - Assigned the Workflow Inbox responsibility to view your inbox.
  - Assigned a secure view if you use OTA.

System Maintenance

Because Oracle 11i is web-based, files are added to your temporary internet file folder. You should periodically purge this folder. Use the following steps:

Step	Action
1	In the Internet Browser, click **Tools/Internet Options** on the Main Toolbar. The **Internet Options** Window displays. In the middle Region, “Temporary Internet Files,” states: “Pages you view on the internet are stored in a special folder for quick viewing later.”
2	Click <**Delete Files**.> The **Delete Files** Window Displays.
3	Click <OK>.

System Changes/New Features

Purpose

This section explains some of the system changes and new features in 11i and the action required to use them.

System Changes/Description/Function

<table>
<tr><th>System Changes</th><th>Description/Function</th></tr>
<tr><td>Switch Responsibility</td><td>Replaced with a new icon on the toolbar (a derby hat).
</td></tr>
<tr><td>System Times Out</td><td>Leave the Oracle picture on the screen, right click on the mouse and click “Refresh” on the menu. Saves logging on again.</td></tr>
<tr><td>Function Key F8 is now F11</td><td>For Query:
• Place the cursor in the first blank data field.
• Press F11 and then Ctrl and F11 simultaneously.</td></tr>
<tr><td>List of Values (LOVs)</td><td>Are located within most windows.</td></tr>
<tr><td>Data fields</td><td>Color denotes functionality:
<table><tr><th>Color</th><th>Types of Data Fields</th></tr><tr><td>Blue</td><td>Query</td></tr><tr><td>Yellow</td><td>Required</td></tr><tr><td>White</td><td>Optional</td></tr><tr><td>Gray</td><td>Cannot be entered (typically populates)</td></tr></table></td></tr>
<tr><td>Record Types</td><td>Employee – Ex Applicant: Someone appointed and hired in DCPDS.
Employee: Someone who was converted from Legacy or moved from one region to another (Mod to Mod).</td></tr>
<tr><td>Tabs</td><td>Replaced alternate regions.</td></tr>
<tr><td>Position has enhanced Date Tracking</td><td>You can view all the history of changes that have occurred on a position.</td></tr>
<tr><td>RPA, Salary Change, Awards and Mass Awards</td><td>System calculates percentages.</td></tr>
</table>

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System Changes/New Features, Continued

System Changes/Description/Function (continued)

System Changes	Description/Function
If you cancel a realignment:	The employee goes back to previous position.
New **HR Manager** Navigator Menu Items:	**Career Management**: (Rating Scales, Competencies, Competence Types, Competence requirements, Schools & Colleges, Qualification Types, Assessment Template, and Appraisal Template.)

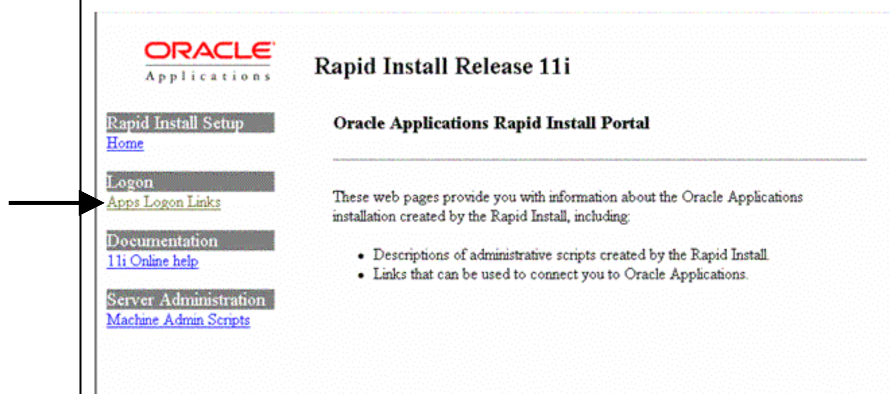
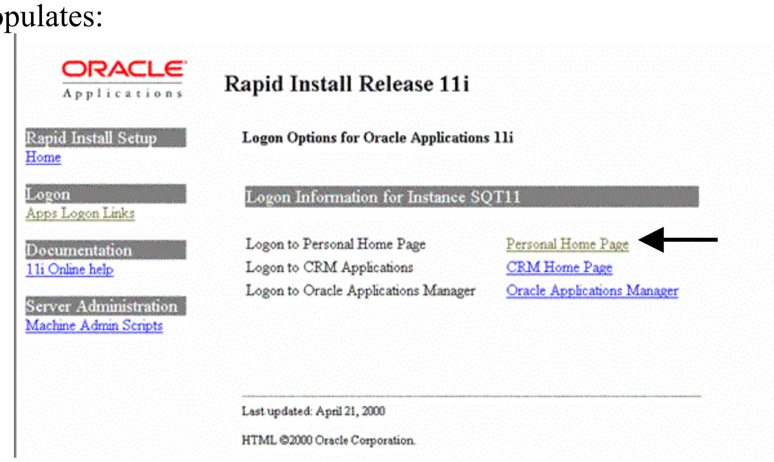
Logging On

Purpose

This section shows you how to log on to Oracle 11i.

Logging On

Follow these steps to log on:

Step	Action
1	Click on the **Oracle 11i** Icon on your desktop. The **Oracle Rapid Install Release 11i Web Page** displays: 
2	Click <**<u>Apps Logon Links</u>**>. The right side of the window populates: 

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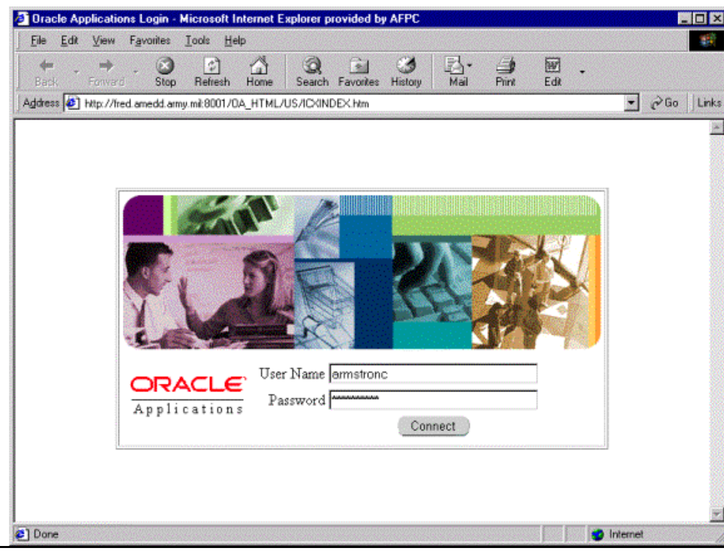
Logging On, Continued

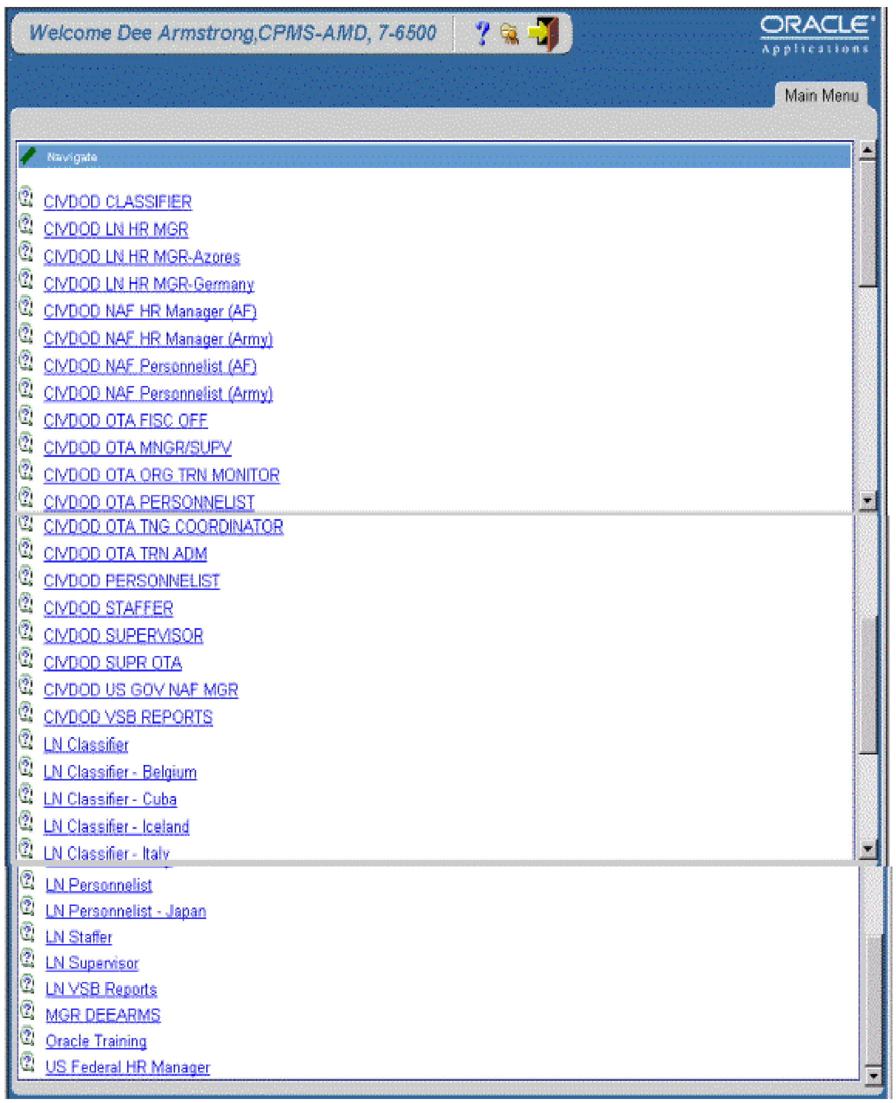
Logging On (continued)

Step	Action
3	Click <**<u>Personal Home Page</u>**>. The **Oracle Application Login** Window displays: 
4	Type your assigned User Name in the **User Name** field.
5	In ***Password***, type in “Password.” Click <Connect> (or Enter).
6	• If you have established an 11i Password, disregard this step. • If you have not established an 11i Password, a screen will display which will ask you to type in the old (“Password”) and your own unique password (twice). Click **<Connect>.**
7	The **Welcome** Window displays with the roles assigned to you.

Navigating

Purpose This section shows how to navigate through Oracle 11i.

Welcome Window

Step	Action
1	On the **Welcome** Window, select your role and double click. For example: "**CIVDOD PERSONNELIST**." 

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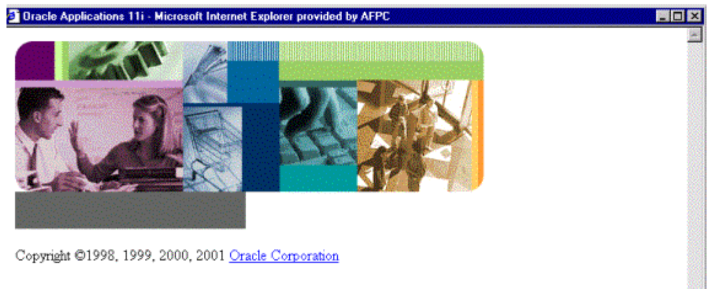
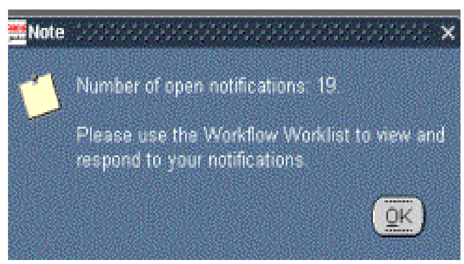
Navigating, Continued

Welcome Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The Oracle Application 11i Window displays as it is connecting, stating: “Loading Java Applet.”



Note: The desk top bottom toolbar displays: e Oracle Appl.</td></tr>
<tr><td>3</td><td>If you have actions in your inbox, a notification displays:



Refer to the Workflow Inbox section in this guide to work these actions after you open the Navigation List. Click <OK>.

Note: Ignore the hour glass which stays on.</td></tr>
</table>

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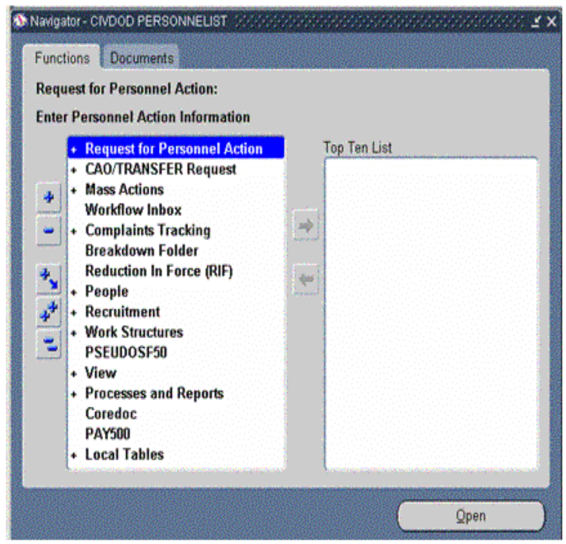
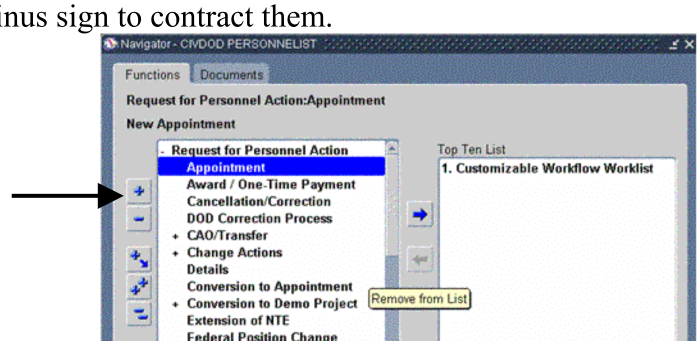
Navigating, Continued

Navigator Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Navigator Window displays with two tabs (Functions and Documents). This list of functions is the starting point to process actions, build positions, maintain employee records, run reports, etc.



</td></tr>
<tr><td></td><td>
<table>
<tr><th>Part</th><th>Description</th></tr>
<tr><td>Functions Tab</td><td>Displays the Navigation List starting with the RPA, or OTA, etc., depending on which role you are in.</td></tr>
<tr><td>Documents Tab</td><td>Not currently used by DoD.</td></tr>
<tr><td>Navigation List</td><td>Displays all the items that may be performed.</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>You may click on the plus sign to expand the functions and the minus sign to contract them.



Double click on the item to start a process, or click <Open>.</td></tr>
</table>

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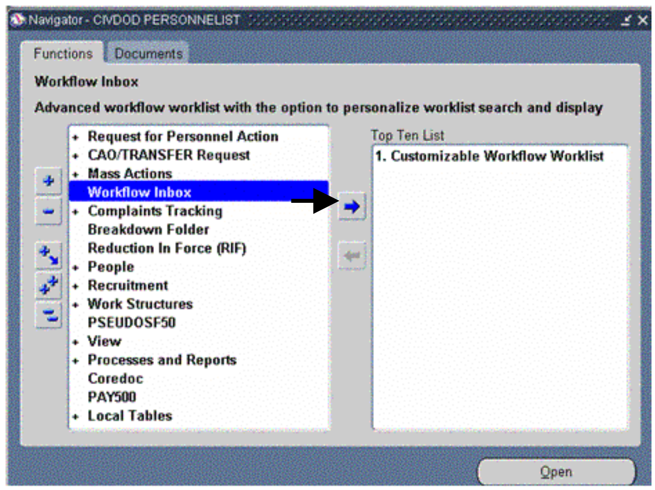
Navigating, Continued

Navigator Window continued)

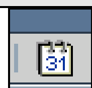
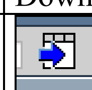
Step	Action
3	To set up a **Top Ten List** of your most frequently performed actions, highlight the item on the list and click the middle arrow key to the right. The item displays under "**Top Ten List**." For example: Highlight **Workflow Inbox** and click the arrow key. The **Top Ten List** populates with **"1. Customizable Workflow Worklist."**  To view your inbox in the future, you only need to type a "1" to open the **Worklist.**

Toolbar Icons, Functions, and Shortcut Keys

Toolbar Icons

Click the Icon on the toolbar to display the function:

Functions, Shortcut Keys, and Icons in Alphabetical Order:

Functions	Shortcut Keys/ Icons	Functions	Shortcut Keys/ Icons
Alter Effective Date (calendar)		Find (flashlight)	
Attachments (paper clip)		Folder Tools	
Block Menu	Ctrl+B	List of Values	Ctrl+L
Clear Block	F7	List Tab Pages	F2
Clear Field	F5	Next Block	Shift+PageDown
Clear Form	F8	Next Field	Tab
Clear Record	F6	Next Primary Key	Shift+F7
Commit/Save	Ctrl+S	Next Record	Down
Clear Record (Pencil eraser)		Export Data (document w/blue arrow)	
Count Query	F12	List of Values	Ctrl+L
Copy (documents)		List Tab Pages	F2
Close Form (yellow folder w/blue arrow)		New (green plus)	
Cut (scissors)		Next Step (arrows on document)	
Date Track History		Next Set of Records	Shift +F8
Delete Record	Ctrl+Up	Previous Block	Shift+PageUp

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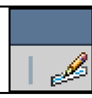
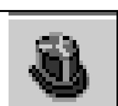
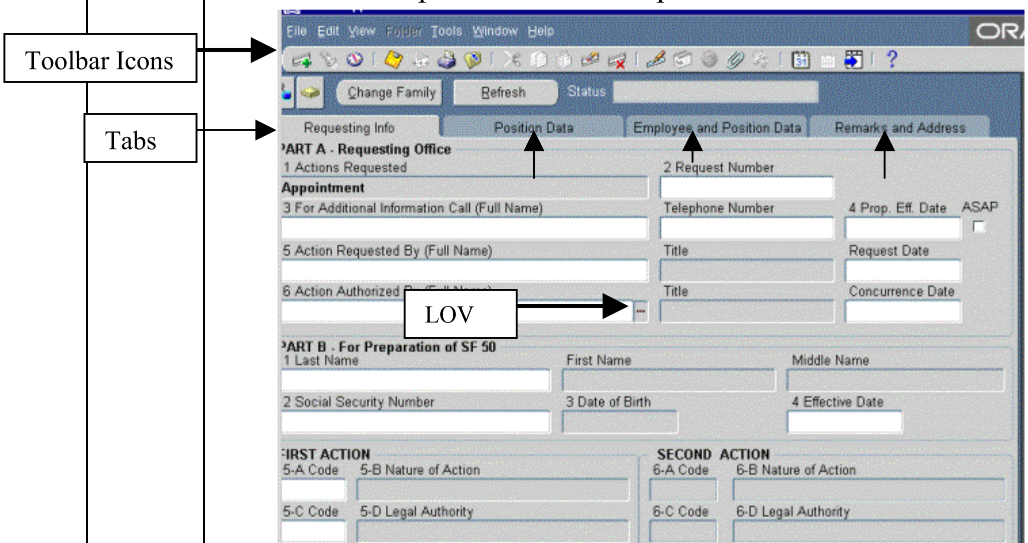
Toolbar Icons, Functions, and Shortcut Keys, Continued

Functions, Shortcut Keys, and Icons in Alphabetical Order: (continued)

Function	Shortcut/ Icon	Function	Shortcut/Icon
Delete (Red X)		Previous Field	Shift+Tab
Display Error	Shift+Ctrl+E	Previous Record	Up
Down	Down	Print	Ctrl+P
Duplicate Field	Shift+F5	Print (printer)	
Duplicate Record	Shift+F6	Return	Return
Edit (pencil)		Save (yellow disc)	
Edit	Ctrl+E	Show Navigator- returns to Menu	
Enter Query	**F11** (Press twice to display last query)	Help	Ctrl+H
Execute Query	**Ctrl+F11** (Use for blind queries to retrieve all records)	Insert Record	Ctrl+Down
Exit	F4	Translations	Not used
Paste		More Information Available	< >
Window Help (blue question mark)		Zoom	Not used
Switch Responsibility			

Request for Personnel Action (RPA)

Accessing the RPA

Step	Action
1	On the **Navigator** Window, double click on the action to be processed, for example, **Appointment**, and the **RPA Appointment** displays. **Note:** Refer to section, "Helpful Function Keys and Icons" in this Guide for an explanation or description of the Toolbar Icons. 
2	There are four tabs across the top: • **Requesting Info** • **Position Data** • **Employee and Position Data** • **Remarks and Address**

Completing the RPA

Step	Action
1	Complete the data fields on **Requesting Info** Tab, using the "pop lists" attached to each data field.
2	Proceed to the next tab until the **RPA** is complete.
3	**Save.**

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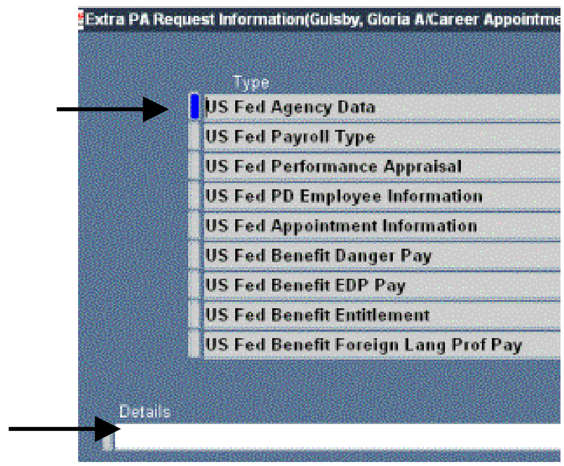
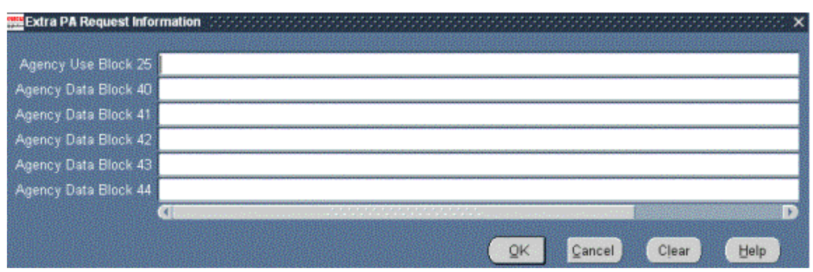
Request for Personnel Action (RPA), Continued

Completing the RPA (continued)

Step	Action
4	Click <**Extra Information**>. The **Extra Information** Flexfields display: 
5	Click on **US Fed Agency Data.** Click in the **Details** Box. The **Extra PA Request Information** Flexfield displays with information in the appropriate fields: 
6	Click on **US Fed Payroll Type.** Complete the data entry and complete the remaining flexfields.
7	**Save** and **Route.**

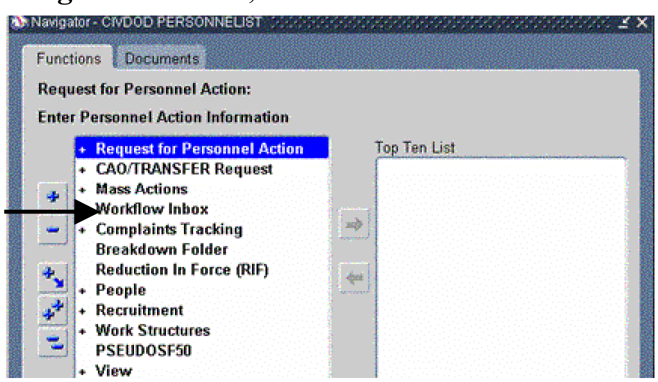
Workflow Inbox

Accessing the Workflow Inbox or Worklist

Your system administrator must add the **Workflow Inbox** to the menu for a responsibility assigned to you before you can access it and view your **Worklist.** It is used to manage your RPAs and Notifications, i.e., HR updates, WGI Notices, etc. For example, a Mass Realignment will display a notice on each employee realigned.

- It lets you choose which notifications to display and what information to display for those notifications.
- In addition to the preconfigured **Worklist** viewing options, you can create personal **Worklist** views by defining a set of filtering criteria to determine what types of notifications and properties to display.
- You can:
    - Perform one-time searches to locate notifications you want to view.
        - Save the search criteria as a personal **Worklist** view to repeat the same search later.
    - Respond to your notifications.
    - Reassign notifications to another user.
    - Request more information about a notification from another user, and define automatic notification routing rules.

Note: Your System Administrator can turn off notices that may fill up your viewing space in the inbox, such as notices for the manager to approve an RPA; a Personnelist to approve an RPA, and Auto WGI notices.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigator Window, double click on Workflow Inbox.


</td></tr>
</table>

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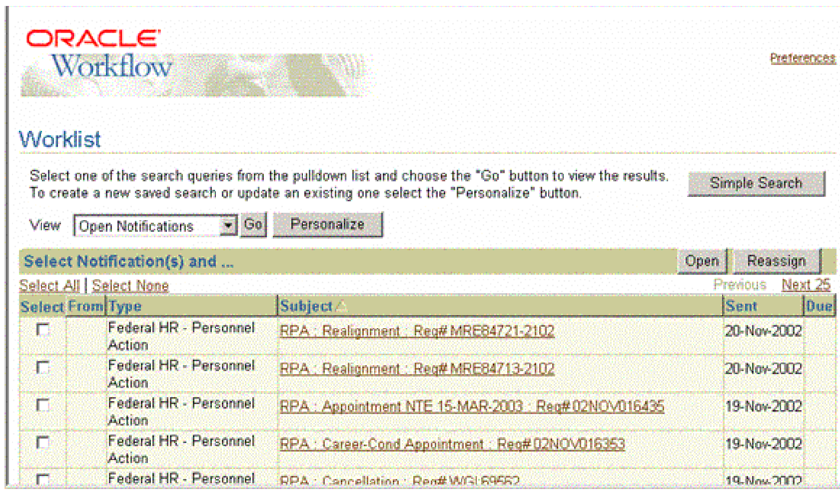
Workflow Inbox, Continued

Accessing the Workflow Inbox or Worklist (continued)

Step	Action
2	The **Worklist** Window displays: 

Worklist Window Description

The features associated with this new inbox for viewing and responding to notifications are:

- Simple and advanced searches
- Customized views (Personalize)
- Open and reassign
- Creating routing rules to manage your notifications

Buttons/Links	Function
Return to Portal	To be developed.
Logout	To be developed.
Preferences	Displays a General Preference Window – not currently used.
Help	Assists with the window.
View	List of preconfigured views.
Go	Execute the search to review the results.
Personalize	Creates a custom view
Simple Search	Locates a one-time search of notifications that match your criteria

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Workflow Inbox, Continued

Worklist Window Description (continued)

<table>
<tr><th>Buttons/Links</th><th>Function</th></tr>
<tr><td>Open</td><td>Opens the selected notification.</td></tr>
<tr><td>Reassign</td><td>Currently not available.</td></tr>
<tr><td>Select All</td><td>Selects all notifications on the current page using check boxes.</td></tr>
<tr><td>Select None</td><td>Deselects notifications.</td></tr>
<tr><td>Next</td><td>Allow you to view next 25 notifications for the preconfigured views. (Customized views can be set for a different number to view.)</td></tr>
<tr><td>Columns</td><td>Allows you to sort the columns by clicking on the desired column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order. For example, click on Subject and the notifications are sorted alphabetically by subject, i.e., all the cancellations are listed together, and all the corrections are listed together, by Sent date.
<table>
<tr><td>From</td><td>The role from which the notification was sent.</td></tr>
<tr><td>To</td><td>The role to which the notification was sent.</td></tr>
<tr><td>Type</td><td>Displays name of the item type of the notification:
Federal HR-Personnel Action (RPA),
OTA Training Request Forms.</td></tr>
<tr><td>Subject</td><td>Description of the notification.</td></tr>
<tr><td>Sent</td><td>Date when the notification was delivered.</td></tr>
<tr><td>Due</td><td>Date by which the notification should be completed.</td></tr>
<tr><td>Status</td><td>Shows “Open,” “Closed,” or “Cancelled.”</td></tr>
</table></td></tr>
</table>

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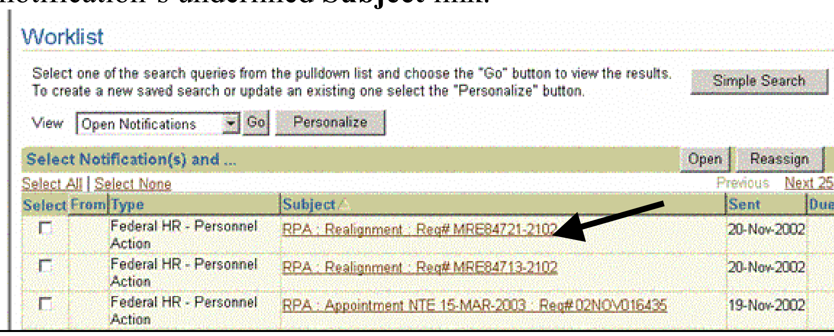
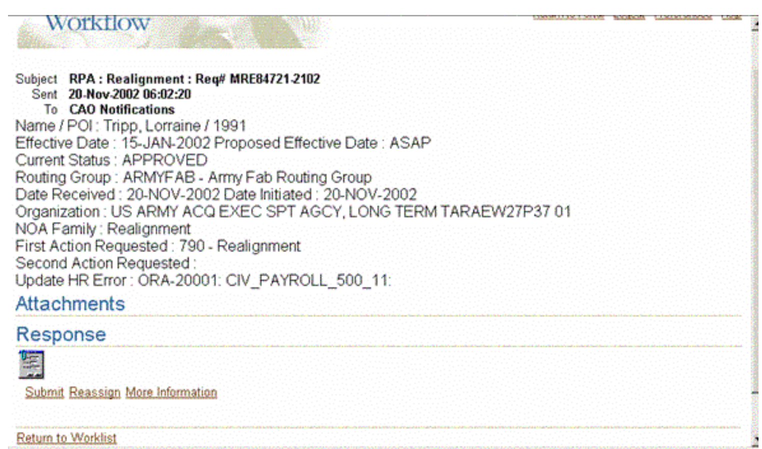
Workflow Inbox, Continued

Viewing the Details of a Notification

Step	Action
1	Navigate to the full details of a notification by clicking on the notification's underlined **Subject** link. 
2	The **Notification Details** Window displays:  • If you revisit a notification to which you have already responded, the **Response** section indicates that the response has been submitted, and displays the response values that were submitted. • If a notification does not require a response, the **Response** section indicates that as well. Choose the **Close** button in the **Response** section to close the notification so that it does not appear in your **Worklist** the next time you view your open notifications.

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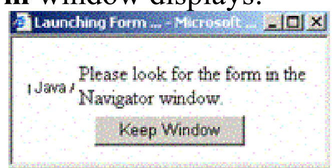
Workflow Inbox, Continued

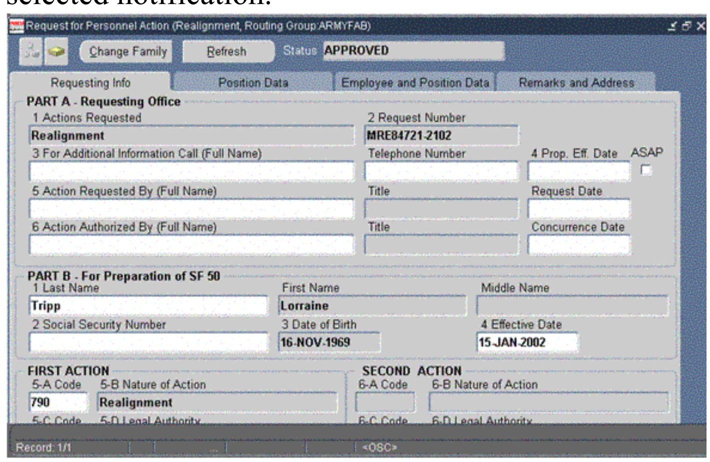
Viewing the Details of a Notification (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on the attached form icon in the Response section to act on the notification.

</td></tr>
<tr><td>4</td><td>The Launching Form window displays:



You can choose <Keep Window> to continue displaying the launch window. Otherwise, this window automatically closes after 30 seconds.</td></tr>
<tr><td>5</td><td>The Request for Personnel Action form displays with the details of the selected notification.



Note: If the RPA does not open when selected, it might be “minimized” and you have to click on the Oracle Application at the bottom of your desktop to retrieve it.</td></tr>
<tr><td>6</td><td>Enter your information. Save and route the RPA. Or, if you need more information, close.</td></tr>
</table>

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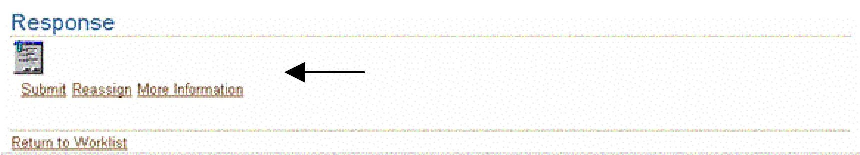
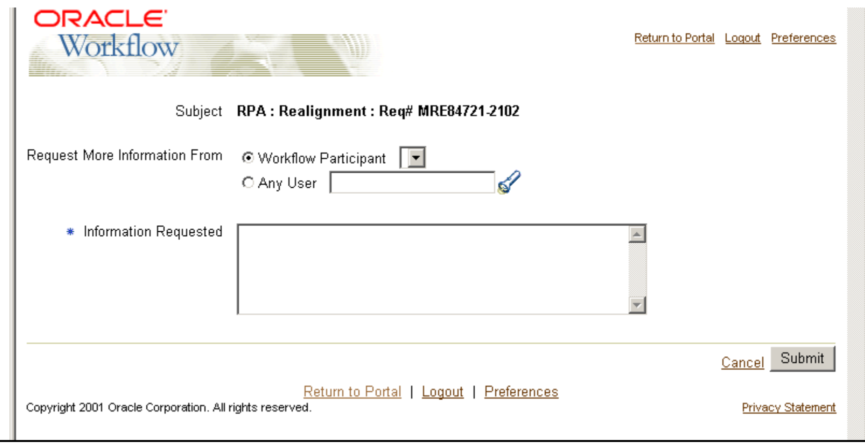
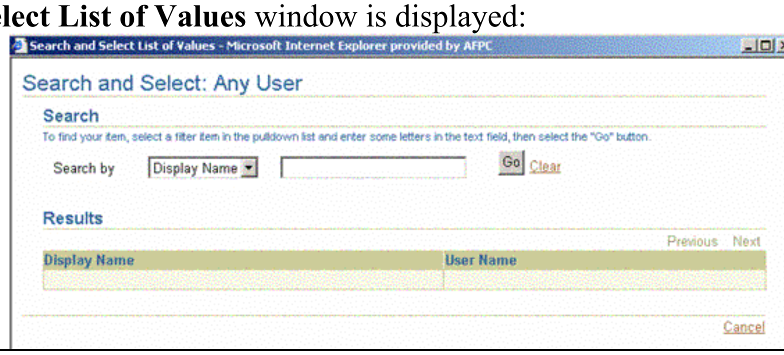
Workflow Inbox, Continued

Viewing the Details of a Notification (continued)

Step	Action
7	To request additional information for an RPA, click on the **More Information** link. 
8	The **Request More Information** window displays: 
9	Select **Any User**, and click on the flashlight. The **Search and Select List of Values** window is displayed: 

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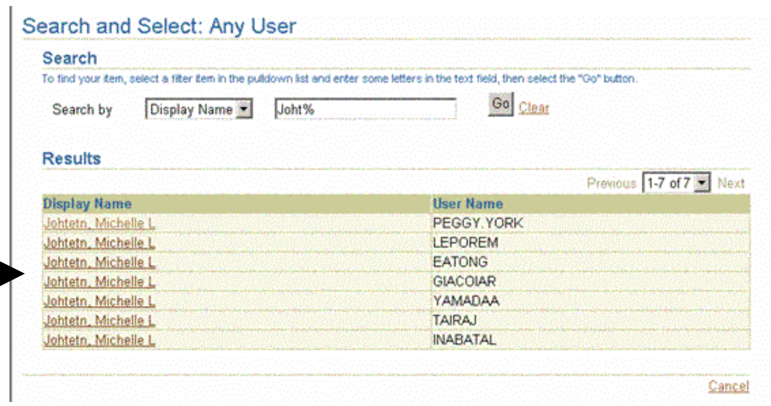
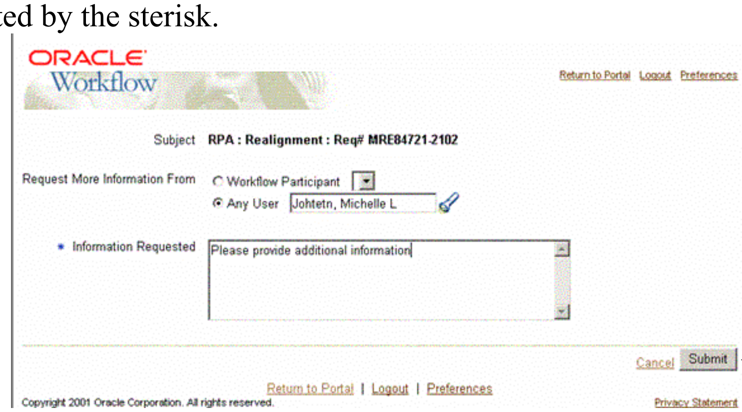
Workflow Inbox, Continued

Viewing the Details of a Notification (continued)

Step	Action
10	Choose **Search By**, Display Name on the drop down list, and enter a value for the display name using the wildcard (%) to search, if necessary. Click <**Go**> to view the results of the search. 
11	In the **Results** section, select a name by clicking on the underlined **Display Name**. The **Request More Information** window displays with the selected User Name. Enter your remarks in the **Information Requested** section. This datafield is required as indicated by the sterisk. 

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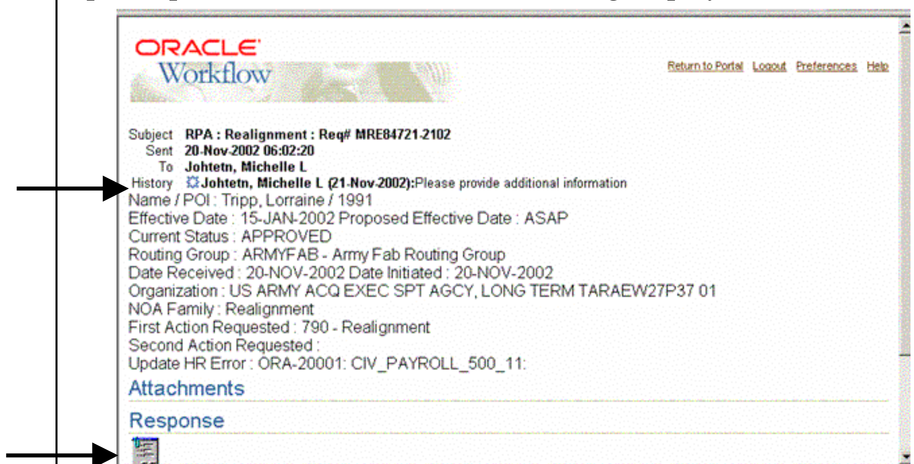
Workflow Inbox, Continued

Viewing the Details of a Notification (continued)

Step	Action
12	Click <**Submit**>. The request is sent to the specified user. The user opens up the notification and the following displays:  This **History** line shows who the request was sent to along with comments from the sender. The receiver then clicks on the **Response Icon.** You can also select <**Cancel,**> to return to the previous page without sending the request. After you request more information for a notification, the notification does not appear in your **Worklist** as an open notification until the user responds to your request. However you can still view the notification by selecting the view **Notifications From Me** from the Worklist window. • If you do not want to wait for the additional information requested, you can respond to the notification using the Response section of the Notification Details page. In this case, your pending request is cancelled. • If you want to request more information from a different user, you can submit a new request using the <**More Information**> button in the **Response** section of the Notification Details page. In this case, your initial request is replaced by the new request, and only the user to whom you sent the new request can respond with more information.

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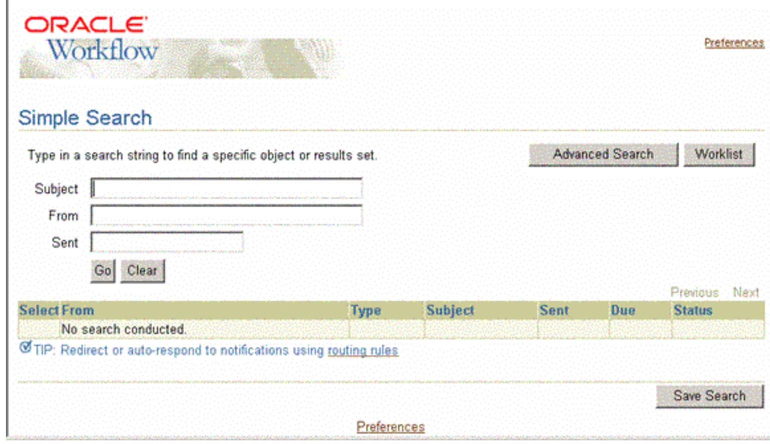
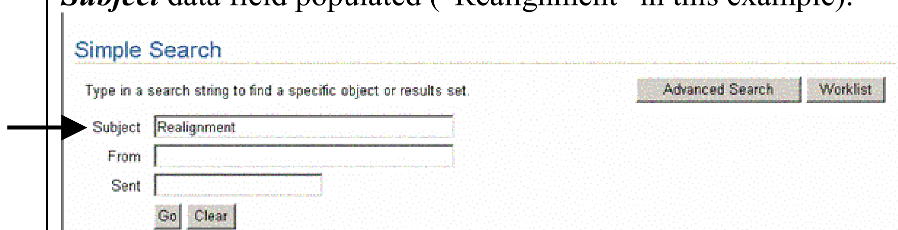
Workflow Inbox, Continued

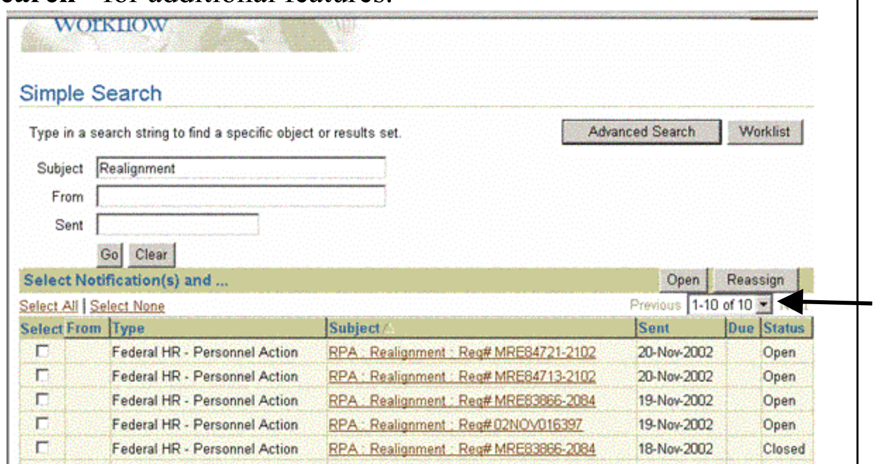
Simple Search

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Worklist Window, click <Simple Search>. The Simple Search Window displays:

</td></tr>
<tr><td>2</td><td>Enter your search criteria to locate specific notifications. The search options are Subject, From, and Sent. For example, in the Subject data field enter “Realignment”, “Cash Awards,” or “Corrections,” etc. The Simple Search Window displays with the Subject data field populated (“Realignment” in this example).

</td></tr>
<tr><td>3</td><td>Click <Go>.</td></tr>
</table>

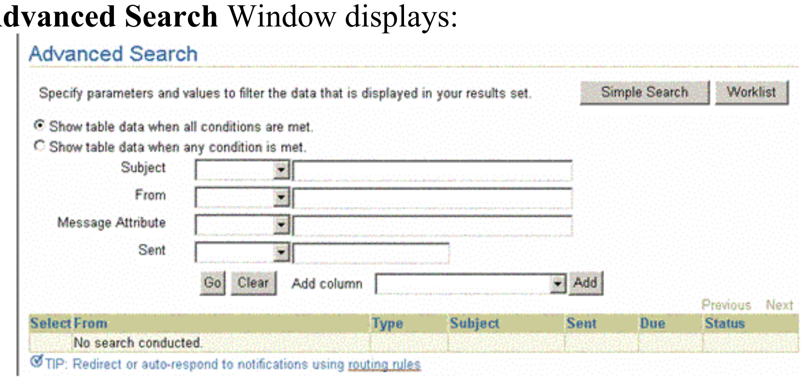
Continued on next page

Workflow Inbox, Continued

Simple Search (continued)

Step	Action
4	The **Simple Search** Window displays with the notifications that match your criteria including those that are closed. Click <**Save**> to save your search for a future view. If this search does not provide enough parameters, you can go to the <**Advanced Search**> for additional features.  **Note:** The total number of records that match your criteria is indicated above the notifications list.

Advanced Search

Step	Action
1	On the **Simple Search** Window, click <**Advanced.**> The **Advanced Search** Window displays: 

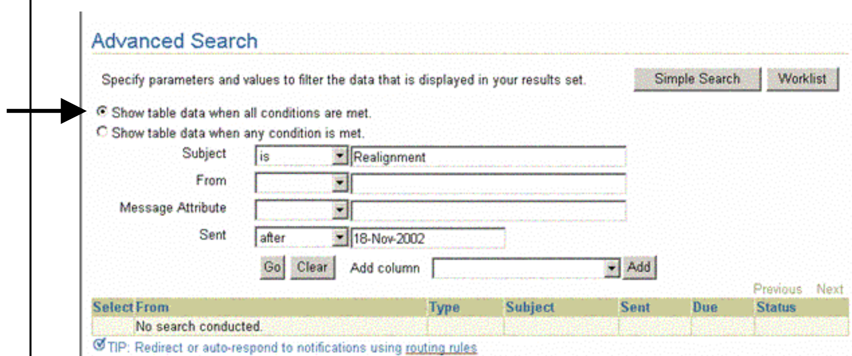
Continued on next page

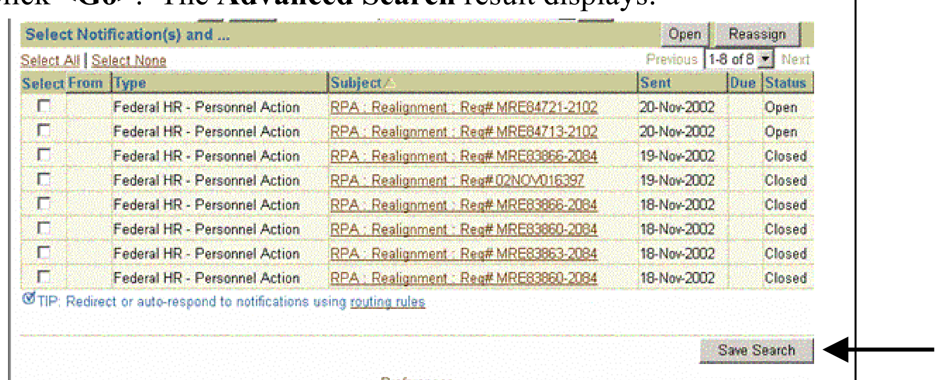
Workflow Inbox, Continued

Advanced Search (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Select one of the options for locating specific notifications. Select one of the two radio buttons:

“Show table data when all conditions are met.” (Results in notifications that only met all of your criteria.)
“Show table data when any condition is met.” (Results in notifications that match at least one of your search criteria.)
</td></tr>
<tr><td>3</td><td>To select notifications that meet all conditions, click the first radio button.

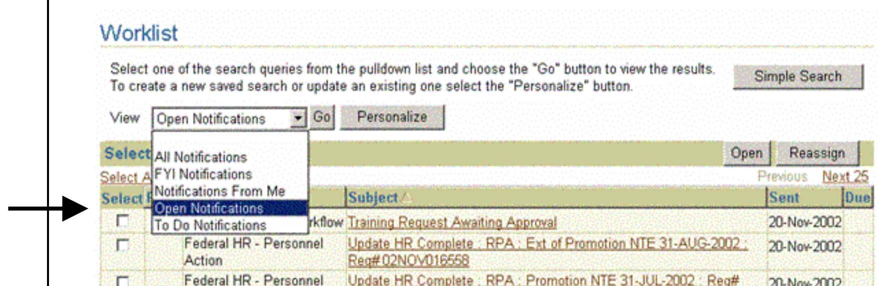
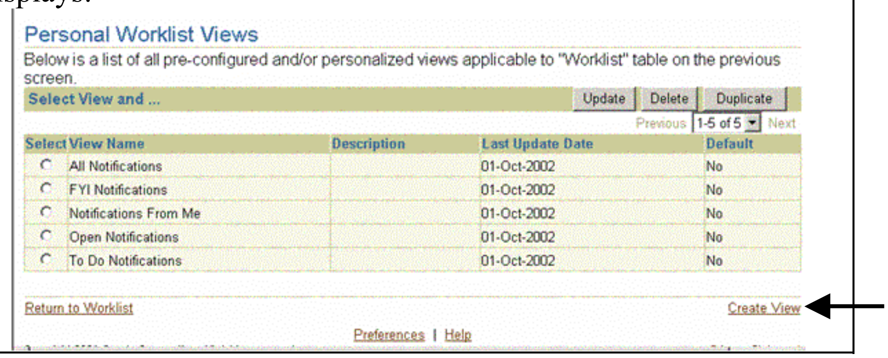

</td></tr>
<tr><td>4</td><td>In the Subject drop down list, select “contains.”</td></tr>
<tr><td>5</td><td>Enter “Realignment” in the subject data field.</td></tr>
<tr><td>6</td><td>In the Sent drop down list, select “after” and enter the date.</td></tr>
<tr><td>7</td><td>Click <Go>. The Advanced Search result displays:


</td></tr>
<tr><td>8</td><td>You can save this search criteria for future use by clicking <Save Search> at the bottom of the Worklist. The Create View Window displays. Follow the procedures for creating a view if desired. See Personalized View in this section for details.</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

Personalized View

Step	Action
1	The **Worklist** Window defaults to "Open Notifications." There are four other preconfigured views on the drop down list: • All Notifications • FYI Notifications (Includes those not routed for approval) • Notifications From Me (Only those you generated) • To Do Notifications (Require actions) Example: 
2	Use any of the preconfigured views, or create your own view. Click <**Personalize**>. The **Personal Worklist Views** Window displays: 

Continued on next page

Workflow Inbox, Continued

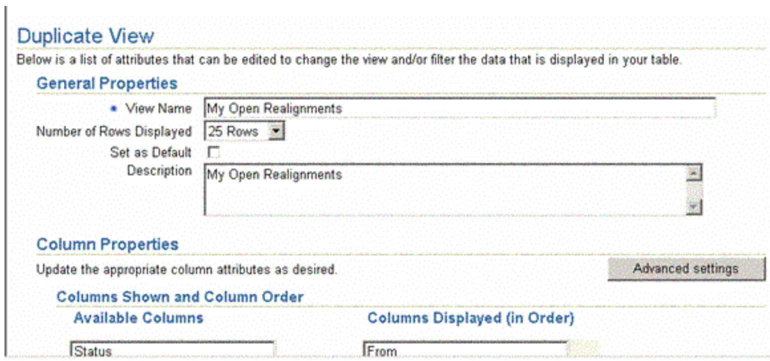
Personalized View (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

- You can duplicate one of the preconfigured views by selecting one of the views and clicking <**Duplicate**>.
- Or you can create your own view, by clicking on the **Create View** Link at the bottom of the window.

</td></tr>
<tr><td>4</td><td>

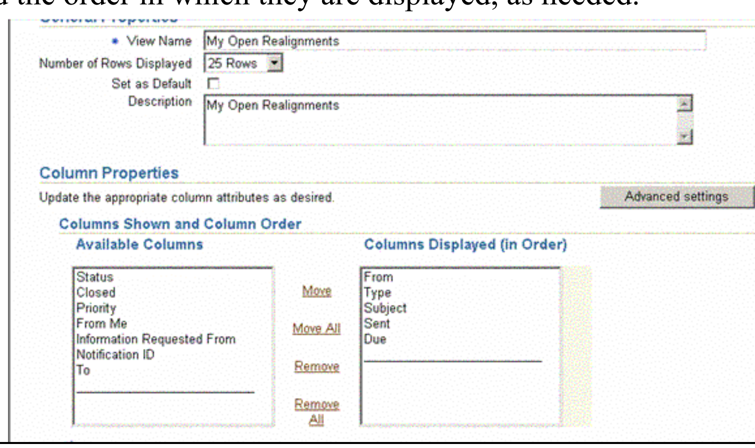
To duplicate a preconfigured view, select the view to duplicate, i.e. Open Notifications. Click <**Duplicate**>. The Duplicate View Window displays:



</td></tr>
<tr><td>5</td><td>

In the **General Properties** section, enter a ***View Name***, ***Number of Rows*** to be displayed, and a ***Description.*** If you would like this view to be the default view when opening the Worklist, check the **Set as Default** box (currently not working.)

Under **Column Properties**, update the columns to be displayed, and the order in which they are displayed, as needed.



</td></tr>
</table>

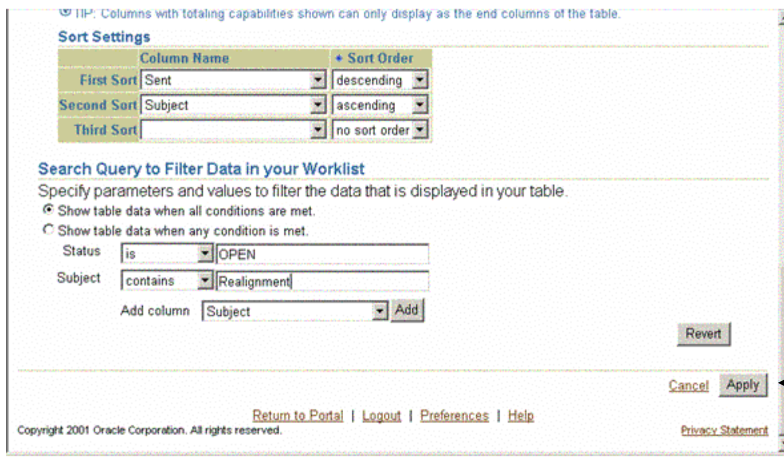
Continued on next page

Workflow Inbox, Continued

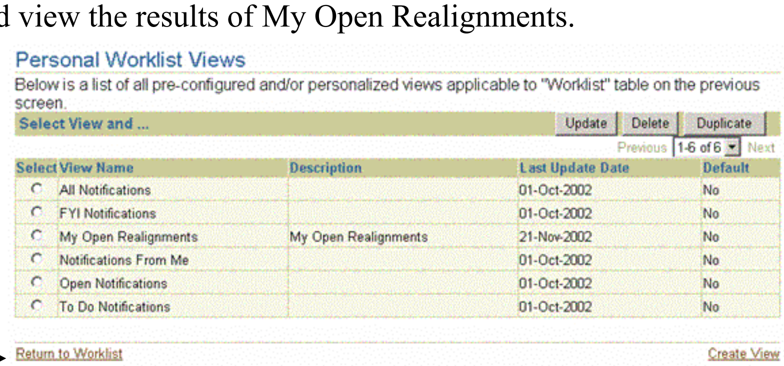
Personalized View (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

- Use the **Sort Settings** section to modify any of the default settings for your custom view.
- To specify additional parameters and values to filter data, make changes in the **Search Query to Filter Data in your Worklist** section.



Click on <**Apply**> when finished to save the new view.</td></tr>
<tr><td>7</td><td>The Personal Worklist Views Window displays, and the list of views now includes the new custom view, My Open Realignments. Click on the Return to Worklist link to select and view the results of My Open Realignments.


</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

Personalized View (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>After selecting My Open Realignments view, the results display:


</td></tr>
<tr><td>9</td><td>To create your own custom view, click on the <Personalize> button from the Worklist Window. The Personal Worklist Views Window displays.

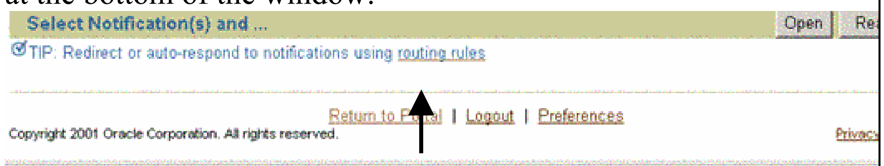
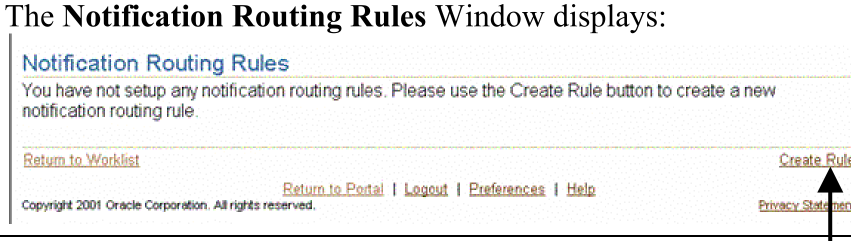
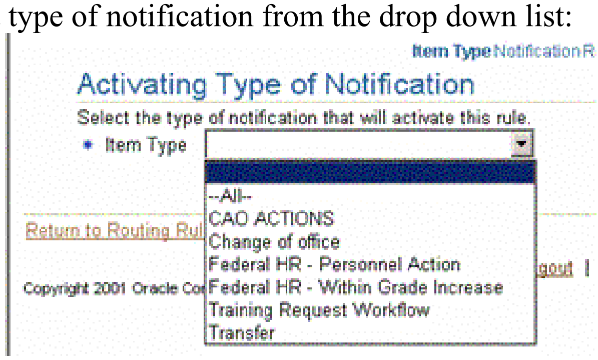
Click on the underlined Create View link.</td></tr>
<tr><td>10</td><td>Follow the instructions for Duplicate view (Steps 4 – 6), to create a new custom view.</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

Creating Routing Rules

You can create customized routing rules for automatic notification processing. For example, you can route certain types of notifications to a co-worker for coordination.

Step	Action
1	On the **Worklist** Window click the underlined **routing rules** link at the bottom of the window: 
2	The **Notification Routing Rules** Window displays: 
3	Click on the underlined **Create Rule.** The **Activating Type of Notification** window displays: 
4	Choose a type of notification from the drop down list:  **Note:** If you choose "All" you can skip to Step 3 Next at the lower right corner.

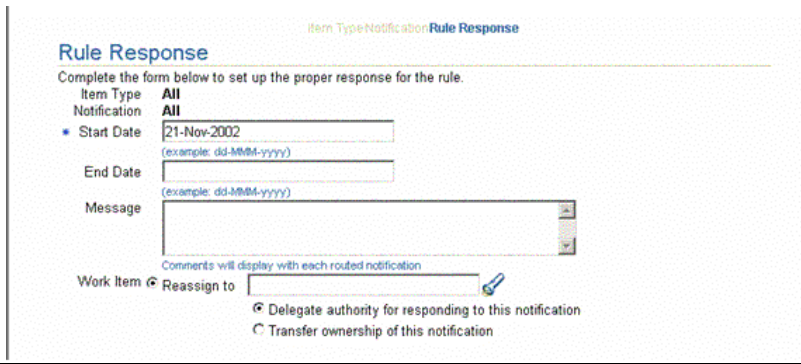
Continued on next page

Workflow Inbox, Continued

Creating Routing Rules (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

Click <**Next**>. The **Rule Response** Window displays:



</td></tr>
<tr><td>6</td><td>

Enter values in the ***Start Date*** and ***End Date*** fields to specify the period that this rule should be active.

- If you leave the ***Start Date*** blank, the rule is effective immediately.
- If you leave the ***End Date*** blank, the rule is effective indefinitely.

CAUTION: Since you can define different rules for the same notifications to be effective at different time, the system allows you to define multiple rules for the same notifications.

- You should be careful to ensure that rules for the same notifications do not overlap in their effective dates.
- If multiple rules are effective for the same notification, Workflow picks one rule at random to apply.

</td></tr>
<tr><td>7</td><td>

In the **Message** field, enter any text that you want to append to the notification when the rule is applies.

Note: "**Reassign to**" is currently under development.

</td></tr>
<tr><td>8</td><td>

Choose:

- <**Submit>** to save the rule,
- <**Cancel**> to return to the Worklist without creating or updating the rule, or,
- <**Back**> if you are creating a new rule, to return to the previous page.

</td></tr>
</table>

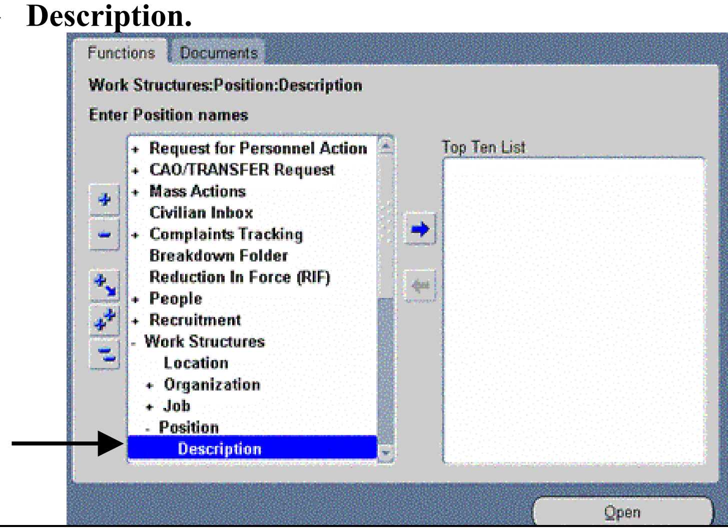
Position Window

Introduction

There are new features to the Position area:

- Position history is now date tracked. It allows you to:
  - Query the position at a certain date,
  - View the past changes made to the position,
  - Make multiple changes on the same day.
    - Correct – Changes back to date the position was established;
    - Update – Changes from this date forward.
- Position ***Type*** on the **Position Details** Tab contains new data:
  - **Single Incumbent** (Defaults to all new positions)
  - **None** (Reflected in converted records – need to be changed to Single Incumbent)
  - **Pooled** (Not currently used)
  - **Shared** (Not currently used)
- On the **Hiring Information** Tab, ***Full Time Equivalent*** (FTE) and ***Headcount*** default to "1." (You can change the FTE for reports.)
- Updatable data fields are yellow and white; gray fields are not used by DoD.
- When you delete positions, the sequence numbers are recycled and are used again.
- ***Position Name*** is now ***Date Effective Name,*** so you can use date tracking and view the position name as of that date.

Accessing the Position Window

Step	Action
1	On the **Navigator** Window, click **Work Structure** → **Position** → **Description.** 

Continued on next page

Position Window, Continued

Accessing the Position Window (continued)

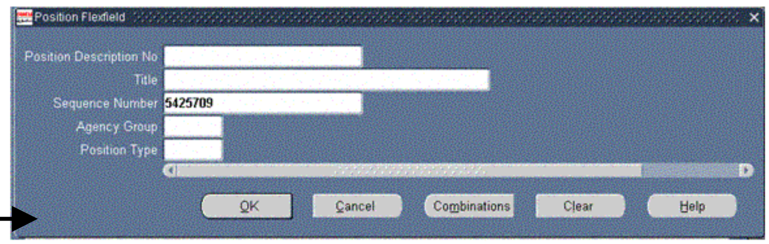
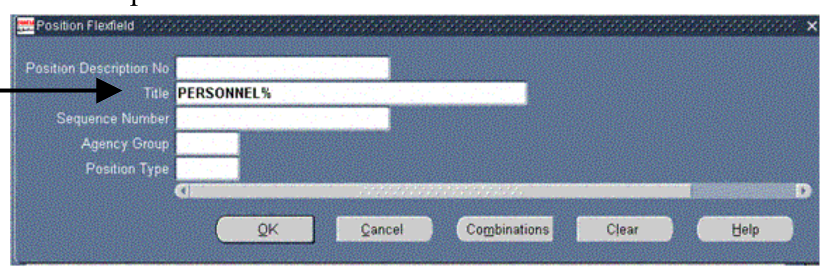
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The Find Positions Form displays:


This form is a new feature provides you an easy method to retrieve a blank Position Window for building a new position, and for querying current positions in the data base.
You can query on any of the data fields associated with the Name (now Date Effective Name) data fields.
You can use the Sequence Number.
You don’t have to use the periods to separate data, i.e., “.”“PERSONNEL%” is now just “PERSONNEL%.”</td></tr>
</table>

Continued on next page

Position Window, Continued

Accessing the Position Window (continued)

Step	Action
3	On the **Find Positions** Form, click in the name data field. The **Position Flexfield** Form displays with a system-generated ***Sequence Number***, (which is an identified problem to be fixed.) All fields should be blank before entering your query. 
4	Click <**Clear**>. A blank **Position Flexfield** form displays. **Note**: <u>Do</u> <u>not</u> click <**Find**> without entering data in one of the fields. It causes a lengthy delay while the system searches the entire position data base.
5	Enter search criteria in an appropriate field followed by a % sign. For example, in the ***Title*** data field, enter "PERSONNEL%," to retrieve all positions with "PERSONNEL" in the ***Title***.  **NOTE**: The fields are case sensitive. If the **Title** was built with all caps, you must use all caps when entering the **Title** information.

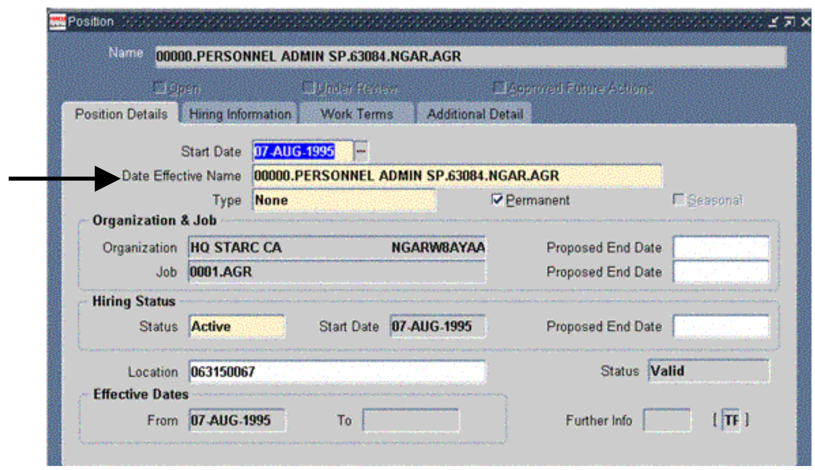
Continued on next page

Position Window, Continued

Accessing the Position Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Click <OK>. The Find Positions form displays with the info in the <i>Name</i> data field:

</td></tr>
<tr><td>7</td><td>Click <Find>. The Position Window displays with the first position that matches your criteria:



The message bar at the bottom of the window displays “Record: 1/?” indicating there is more than one record. Use the Up and Down Keys to search for the position you need.</td></tr>
</table>

Building a New Position

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>If you need to build a new position,
1. Click <New>. The Position Window displays.
2. Enter the information in the four tabs and taskflow buttons.
3. Validate and Save.</td></tr>
</table>

Continued on next page

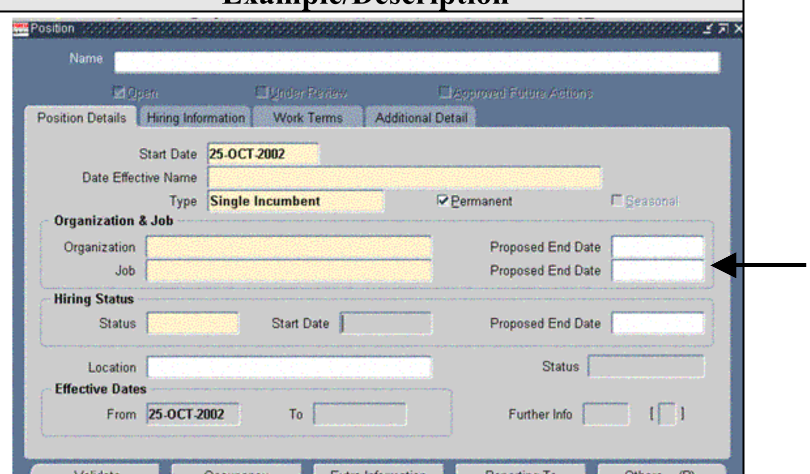
Position Window, Continued

Querying a Current Position

Step	Action
1	If you need to view a current position, or make changes to a current position, you can use the usual query method: 1. Close the **Find Positions** Form. The **Position Details** Form displays. 2. Press **F11** (prior to clicking anywhere on the form), to query the position. 3. Enter the name of the position in the ***Date Effective Name*** data field, for example: ".PERSONNEL%". 4. Press **Ctrl** and **F11** simultaneously. The first position with the query criteria displays. 5. Scroll to the position using the **Up** and **Down** Keys. When the desired **Position** Window displays, make the changes on the appropriate tabs. 6. **Validate** and **Save**.

Position Window Description

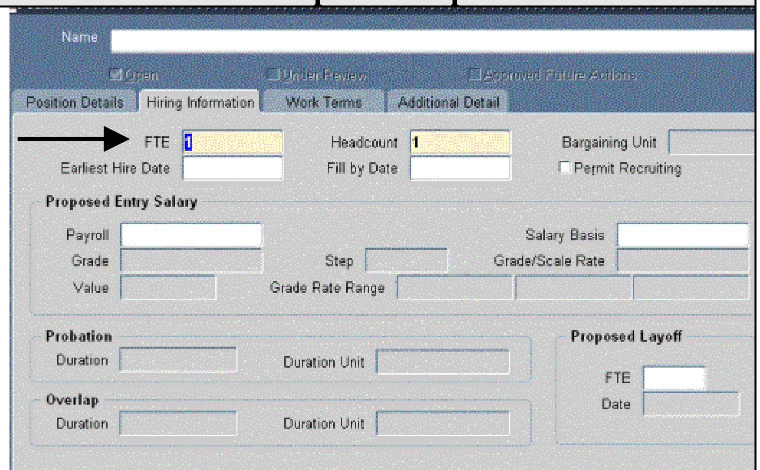
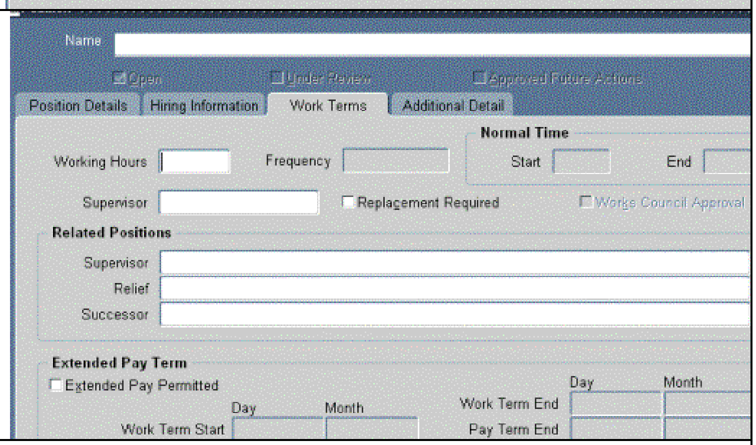
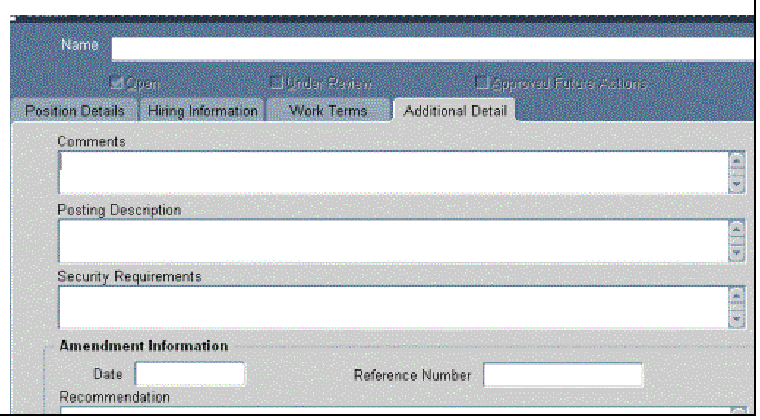
The **Position Window** displays with the **Position Details** Tab open. Click on the other three tabs to display: **Hiring Information**, **Work Terms**, and **Additional Detail**.

Tab	Example/Description
Position Details ***Proposed End Dates*** are Optional	

Continued on next page

Position Window, Continued

Position Window Description (continued)

Tab	Example/Description
Hiring Information **(Full Time Equivalent)**	
Work Terms	
Additional Detail	

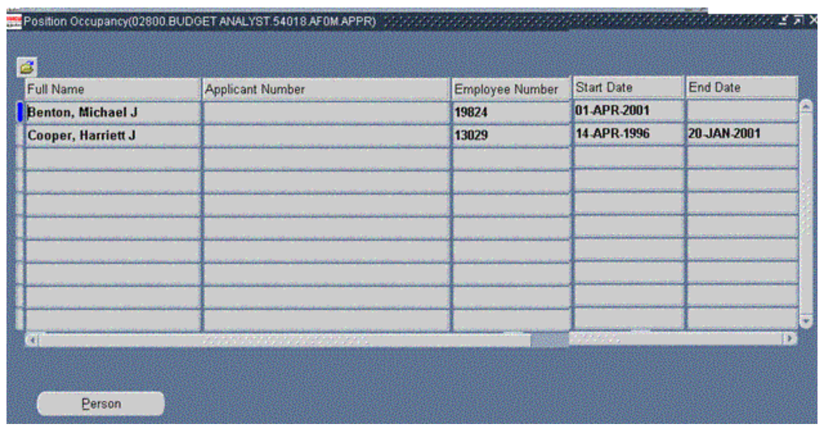
Continued on next page

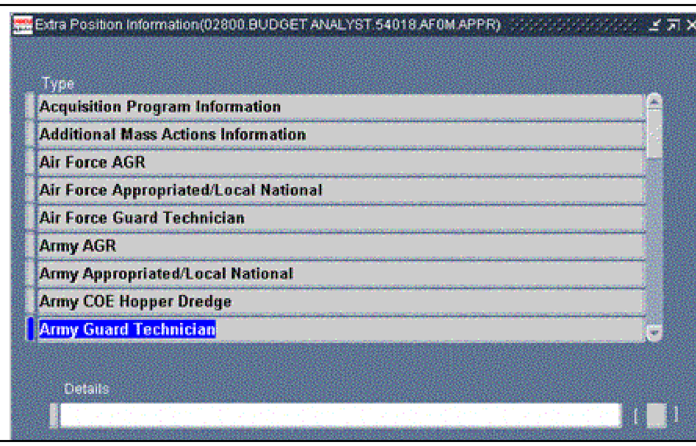
Position Window, Continued

Taskflow Buttons

There are five taskflow buttons on the Position Window:

<table>
<tr><th>Taskflow Button</th><th>Example/Description</th></tr>
<tr><td><Validate></td><td>When you click the Validate taskflow button, the system performs the necessary edit checks and updates the database with the new information.</td></tr>
<tr><td><Occupancy></td><td>Displays the employees who have occupied the position, plus their start and end dates.

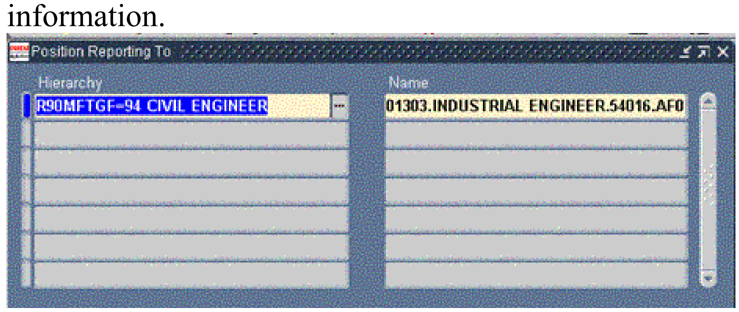
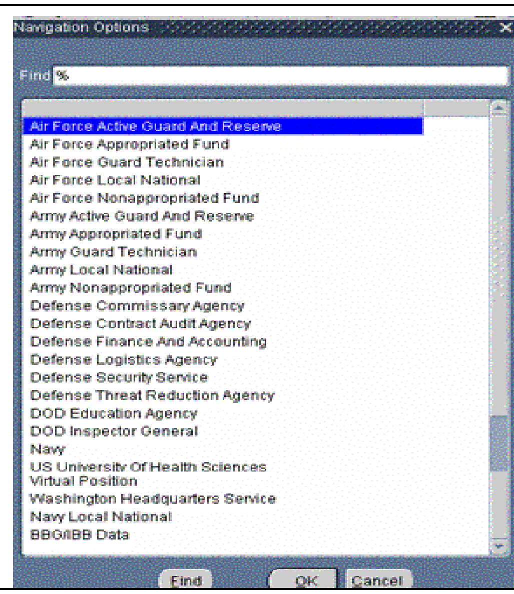


If you want to view the employee's record, you can highlight the name and click <Person> at the bottom of the window.</td></tr>
<tr><td><Extra Information></td><td>
</td></tr>
</table>

Continued on next page

Position Window, Continued

Taskflow Buttons (continued)

Taskflow Button	Example/Description
<Extra Information> (Cont)	• The fields include the data items required to pass the Central Personnel Data File (CPDF) edits, as well as optional position data items required by each component. The system supplies values from the data base for those data items completed earlier in the position build or by direct data entry. • To view or enter **Extra Information** data, highlight the **Type** of information and click in the **Details** Field.
<Reporting To>	This button displays the **Hierarchy** and **Position Name** information. 
<**Others**>	

Continued on next page

Copying a Position

Introduction

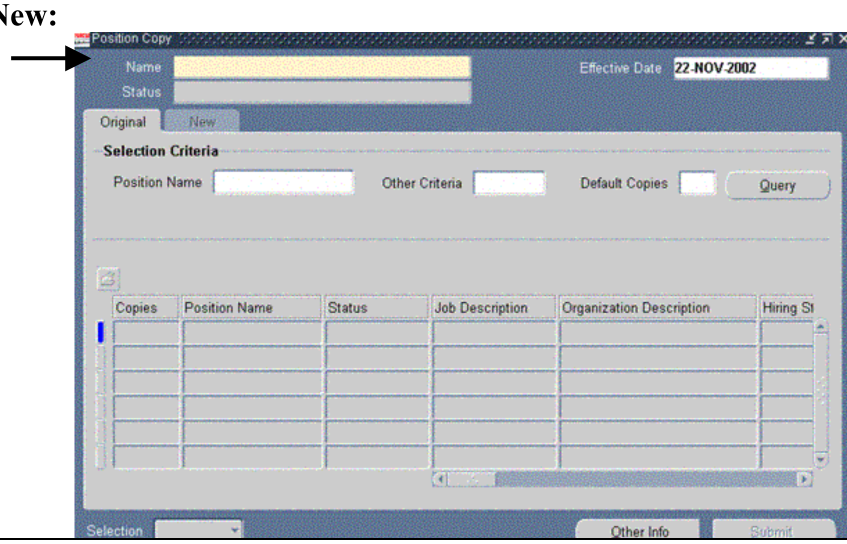
Position Copy reduces the time and effort required to create positions and ensures accurate data. It allows you to:

- Specify criteria for finding and selecting positions.
- Use existing positions and create new ones making minor or major changes to the position definition.
    - Copy a specific position or retrieve all positions that correspond to the criteria.
- Preview the results before creating the final copies.
- Save the set of positions (unlimited) and continue working on it at another time, i.e., when you have received all the information required to complete the position definitions.

Note: It is now possible to copy invalid positions. Be sure the status is "Valid" before copying.

Use the following steps to copy and create multiple positions.

Accessing the Position Copy Window

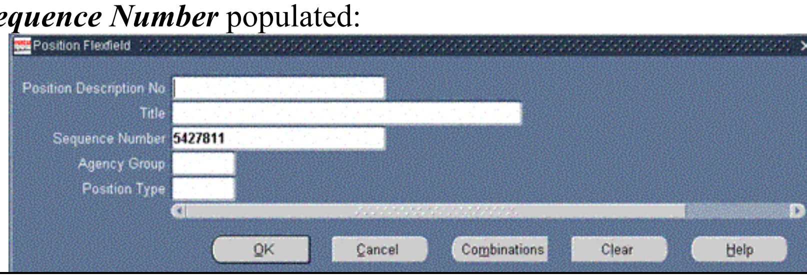
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigator List, click Work Structures → Position → Position Copy. The Position Copy Window displays with two tabs, Original and New:

</td></tr>
</table>

Continued on next page

Copying a Position, Continued

Entering Selection Criteria

You can copy a specific position or retrieve all positions that correspond to the criteria.

Step	Action
1	On the **Position Copy** Window, enter a name in the ***Name*** data field to identify the set of position(s) to be copied. Enter a name even if you are going to copy only one position. For Example, use your initials, date, ***Position Title***, etc.
2	The ***Effective Date*** populates with the current date. • It applies to all the positions that you query. If you do not enter a date, the system uses the current date. • Change the ***Effective Date*** if you want a date that corresponds to the position to be copied.
3	On the **Original** Tab, under selection criteria, click in **Position Name** data field. The **Position** Flexfield displays with the ***Sequence Number*** populated: 
4	Delete the ***Sequence Number.*** (In the future, the **Sequence Number** will not populate at this stage. It is a reported error being fixed.)

Selecting a Position to Copy

There are three ways to query a position on the **Position Flexfield.** You may:

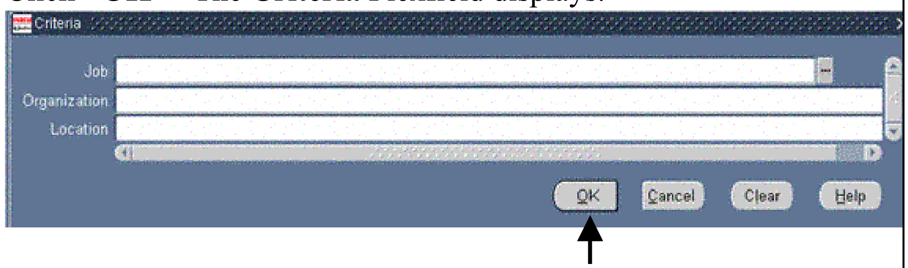
- Enter part of the data, with or without using the <**Combinations**> taskflow button:
  - Entering a ***Sequence Number*** produces only one position;
  - Entering a ***Title*** produces a list of all positions with that title;
- Select all positions by ***Job, Organization***, or ***Location***:
  - Entering a ***Job*** and an ***Organization***, i.e., you can produces a list of all engineers in a certain organization.
- Enter information in all the data fields.

Continued on next page

Copying a Position, Continued

Query by Sequence Number

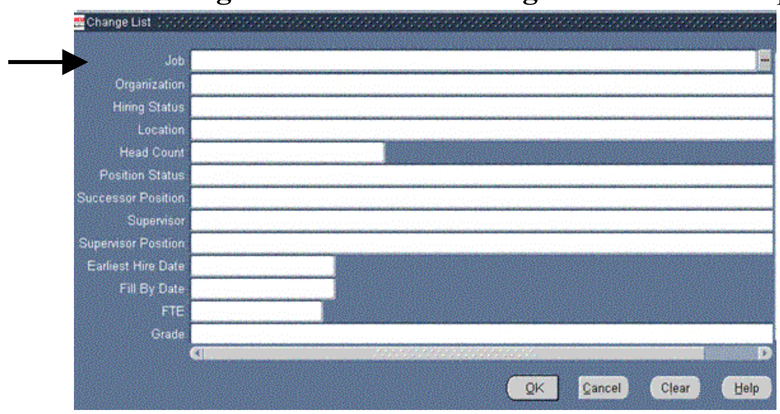
Follow these steps to retrieve a single position, using the ***Sequence Number*** of the position:

Step	Action
1	On the **Position** Flexfield, delete the **Sequence Number**
2	Enter the ***Sequence Number*** you are querying.
3	Click <**OK**> The **Criteria** Flexfield displays. 
4	Click <**OK**>. The **Position Copy** Window displays with "Pending Query" in the ***Status*** data field at the top, and ***Position Name*** populates with the ***Sequence Number*** under the **Selection Criteria**.
5	Enter the number of copies needed in the ***Default Copies*** data field.
6	Click <**Query**>. The **Position Copy** Window displays with "Retrieved Original Record(s)" in the ***Status*** data field. The position data populates in the columns: **Copies, Position Name, Status, Job Description, Organization Description, Hiring Status**, etc. **Note:** The number of copies you entered displays under ***Default Copies*** data field and the **Copies** Column.

Continued on next page

Copying a Position, Continued

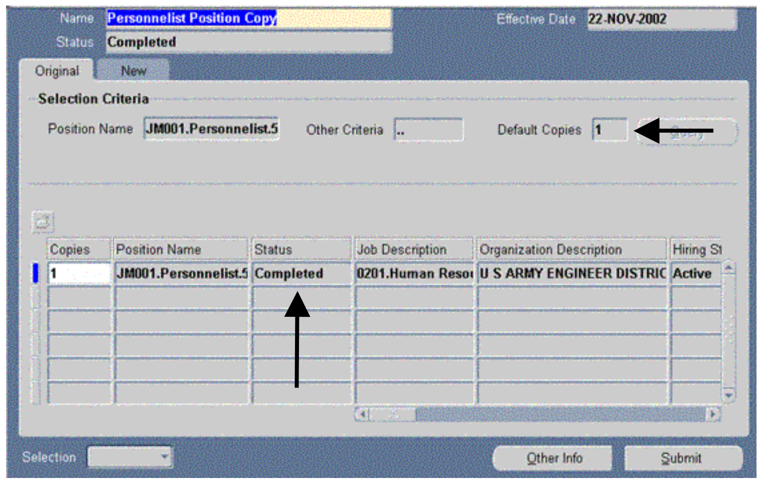
Completing the Position Copy

Step	Action
1	Still on the **Position Copy** Window, click on the **New** Tab.
2	Click in the **Change List** field. The **Change List** Window displays:  Change any of the data fields that apply to the new position(s). Click <**OK**>. Note: **Job** is currently under development.
3	Click <**Create New**> on the upper right side.
4	A Note Message Box displays: "Pending record(s) created on New Tab." Click <**OK**>.
5	The **New** Tab displays with the Position data populated in ***Position Name*** data field and the Columns populate with the number of positions to copy. The ***Status*** data field at the top populates with "Pending New Record(s)."
6	Click <**Submit**> at the bottom of the window.
7	A Note displays: Transaction applied and concurrent request _(#)_____ submitted.
8	If the position copy is in the status of "Error New Record(s)," follow procedures for **Viewing the Process Log**. **Note**: • When the position copy is submitted, the system refreshes the position data with the exception of the **Change List** items and any manual changes you've made. It refreshes the data based on the ***Effective Date***. • The system validates the position using the same validation process it does when you create a position with the **Position** Window. • You can query the new position in the **Position** Window and continue making further changes, for example, in **Position Extra Information.**

Continued on next page

Copying a Position, Continued

Completing the Position Copy (continued)

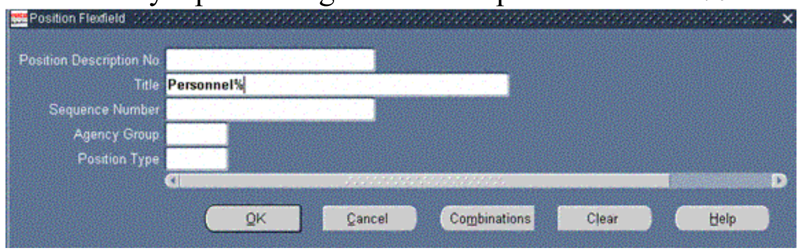
Step	Action
9	Re-query the position copy name (Personnelist Position Copy) to refresh the status. Press **F11**, type in Personnelist%, **CTRL+F11**. The status changes to "Completed." 

Continued on next page

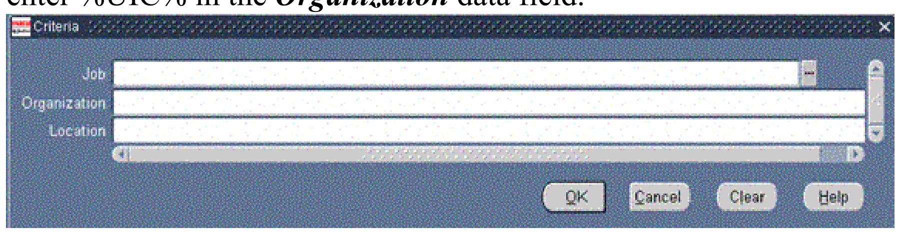
Copying a Position, Continued

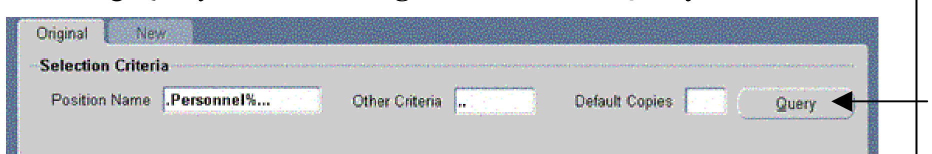
Query by Title

Follow these steps to retrieve a list of positions, using the **Title** of the position:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Position Flexfield, delete the Sequence Number</td></tr>
<tr><td>2</td><td>Move the cursor to the Title data field and enter part of a position title followed by a percent sign. For example: “Personnel%.


Note:

The fields are case sensitive. If the Title was built with all caps, you must use all caps to retrieve it.
Entering “Personnel” will get all the personnel positions in the database. You can select your component on the Criteria Window below.
</td></tr>
<tr><td>3</td><td>Click <OK>.</td></tr>
<tr><td>4</td><td>The Criteria Window displays to further define your search. For example, if you want only Army positions in a particular UIC, you enter %UIC% in the Organization data field.


These fields are optional. Click <OK> to continue.</td></tr>
<tr><td>5</td><td>The Position Copy Window displays with the Status populated with “Pending Query.” On the Original tab, click <Query>.

</td></tr>
</table>

Continued on next page

Copying a Position, Continued

Query by Title (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>A Decision Message Box displays the number of records in the query:

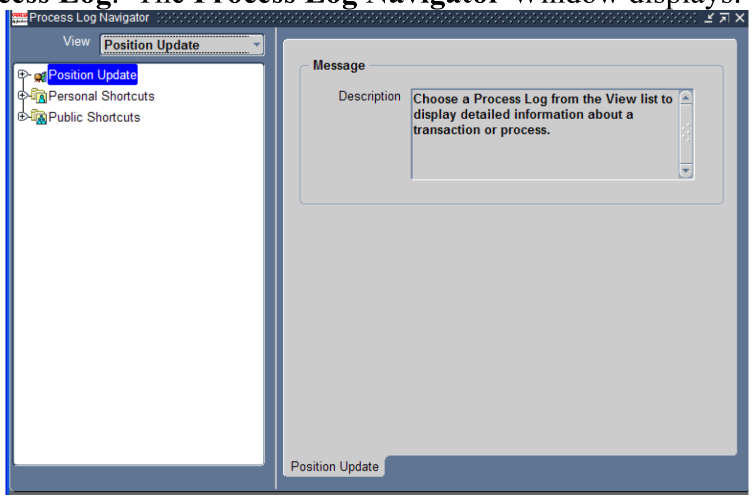
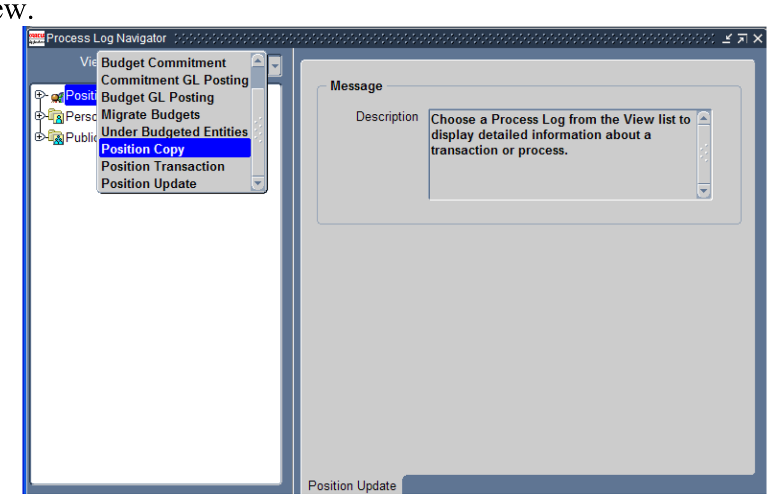

If you want to narrow the search, click <Cancel> and return to the Original Tab and enter more criteria, otherwise, click <Continue>.</td></tr>
<tr><td>7</td><td>The Position Copy window displays with <i>Status</i> populated with “Retrieved Original Record(s).”
On the Original Tab, a list of retrieved positions display in the columns. The Copies Column defaults to “1” copy for each retrieved position.
To deselect the positions you do not want to copy, click the Selection down arrow at the bottom left hand corner.
Click <None>.</td></tr>
<tr><td>8</td><td>All positions are not selected, and the number of copies change to zero. Change the number of copies on the position(s) you want to copy, by typing in the number, i.e. “2.”</td></tr>
<tr><td>9</td><td>Follow the steps in Completing the Position Copy in this section to complete the process.</td></tr>
</table>

Continued on next page

Copying a Position, Continued

Viewing the Process Log

If the status is "Error New Record(s)," use the **Process Log** to view the error message associated with the position copy. The **Process Log** also includes **Position Copy** transactions that completed successfully.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigator List, click Federal Maintenance Forms → Process Log. The Process Log Navigator Window displays:

</td></tr>
<tr><td>2</td><td>Under View, click on the drop down list to select Position Copy view.

</td></tr>
</table>

Continued on next page

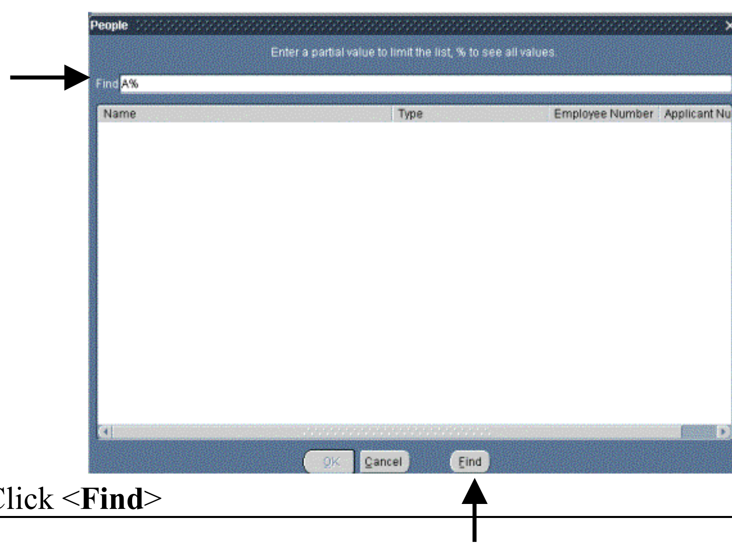
Copying a Position, Continued

Viewing the Process Log (continued)

Step	Action
3	Click on the plus sign (+) next to **Position Copy** to view the list of **Position Copy** transactions. • Green Light indicates "Copied" • Red Light indicates"Errors" The error message is shown on the right under Message. This error is related to invalid data associated with the original Position being copied. You need to correct this information on the **Position** window, and then go back to **Position Copy**. • Re-query the **Position Copy** transaction that is in status of Error New Record(s). • On the **Original** Tab, click **Query**. This retrieves the original position with the correct data. • Click on **New** and continue with the position copy.
4	You may delete a position copy transaction if the status is **Pending New Record(s)** or **Error New Record(s)**. Once the status is **Completed**, you are not able to delete the transaction.

People Window

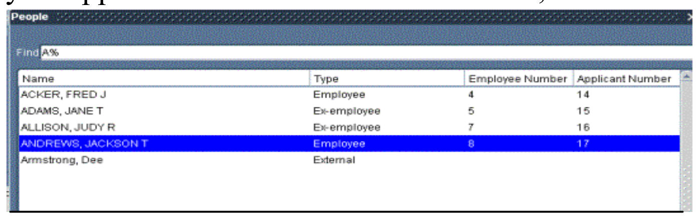
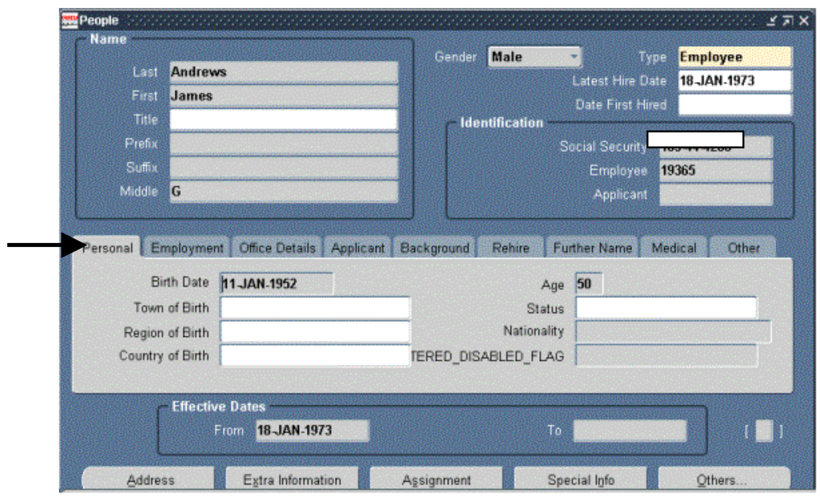
Accessing the People Window

Step	Action
1	On the **Navigator** Window, double click **People** → **Enter and Maintain.** The **Find Person** Window displays: 
2	If you are building an applicant, click <**New**>. The **People** Window displays. Complete the data fields.
3	If you need to make a change to an employee record or view the information in the **Person Summary**, click the LOV at the end of the **Full Name** data field on the **Find Person** Window.
4	The **People** –**Find** Window displays. • Enter a % sign to view all the names in the data base, or • Enter the first letter of the last name with a % sign. For example: "A%" displays all last names starting with an "A."  Click <**Find**>

Continued on next page

People Window, Continued

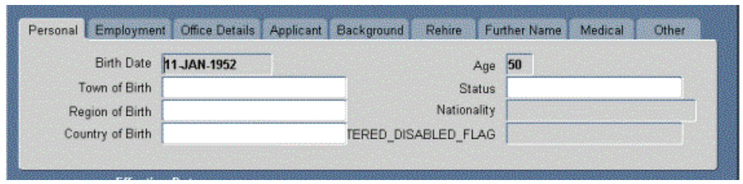
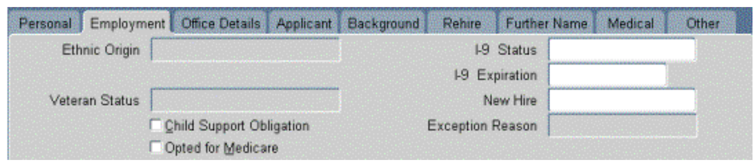
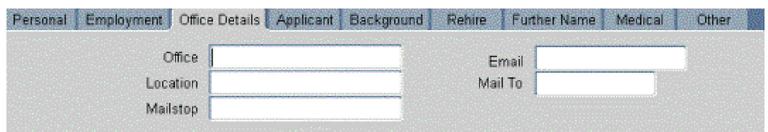
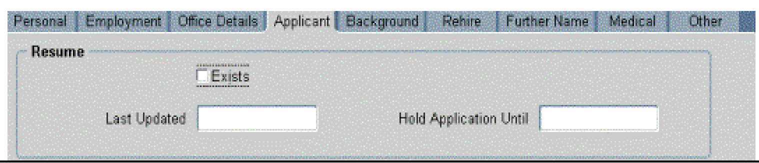
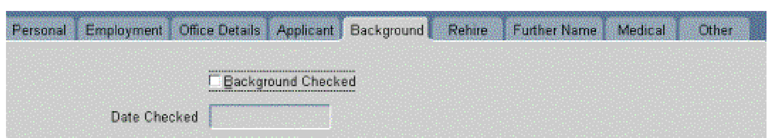
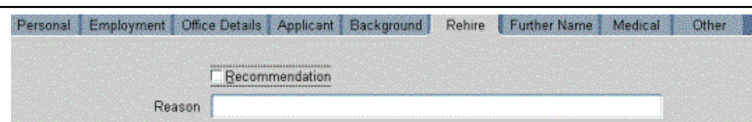
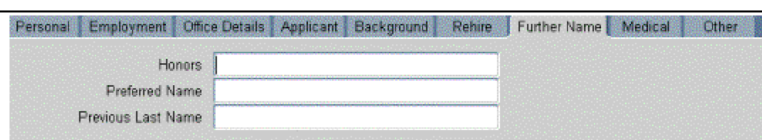
Accessing the People Window (continued)

Step	Action
5	The **People** – **Find** Window displays with a list of names and Employee/Applicant Numbers. Select the name, and click <**OK**>. 
6	The **People** Window displays with the data fields automatically populated. There are nine tabs and five taskflow buttons. The **Personal** Tab displays first. 

Continued on next page

People Window, Continued

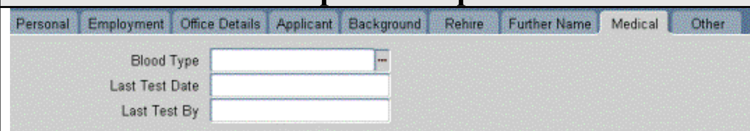
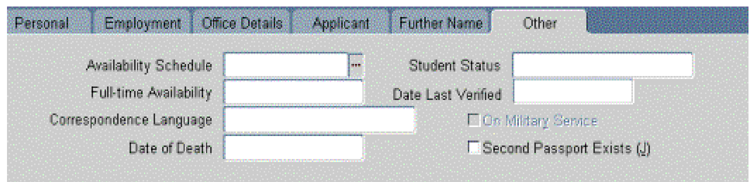
People Window Description

<table>
<tr><th>Tab</th><th>Example/Description</th></tr>
<tr><td>Personal</td><td>
</td></tr>
<tr><td>Employment:</td><td>
</td></tr>
<tr><td>Office Details</td><td>
</td></tr>
<tr><td>Applicant</td><td>
</td></tr>
<tr><td>Background</td><td>
</td></tr>
<tr><td>Rehire</td><td>
</td></tr>
<tr><td>Further Name</td><td>
</td></tr>
</table>

Continued on next page

People Window, Continued

People Window Description (continued)

<table>
<tr><th>Tab</th><th>Example/Description</th></tr>
<tr><td>Medical</td><td>
</td></tr>
<tr><td>Other</td><td>
</td></tr>
</table>

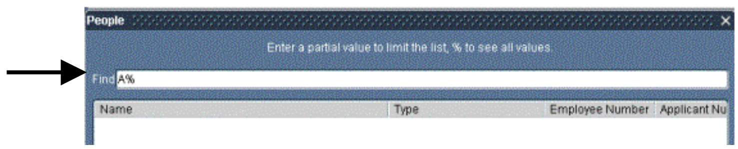
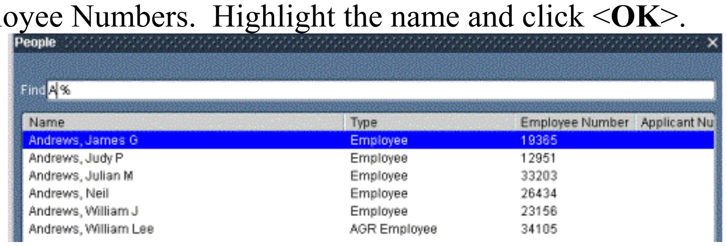
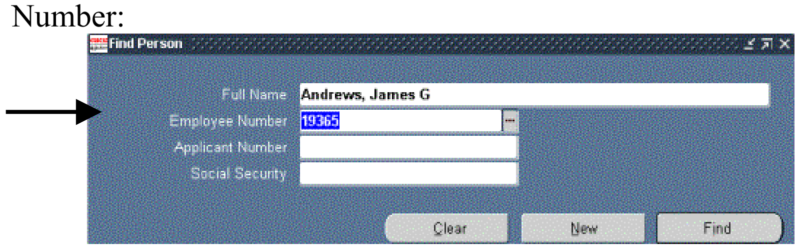
People Window Taskflow Buttons

The **People** Window has five Taskflow Buttons:

- **Address**
- **Extra Information**
- **Assignment** (has six tabs)
- **Special Information**
- **Others** (with **Navigation Options** including the **Person Summary**)

Person Summary

Accessing the Person Summary

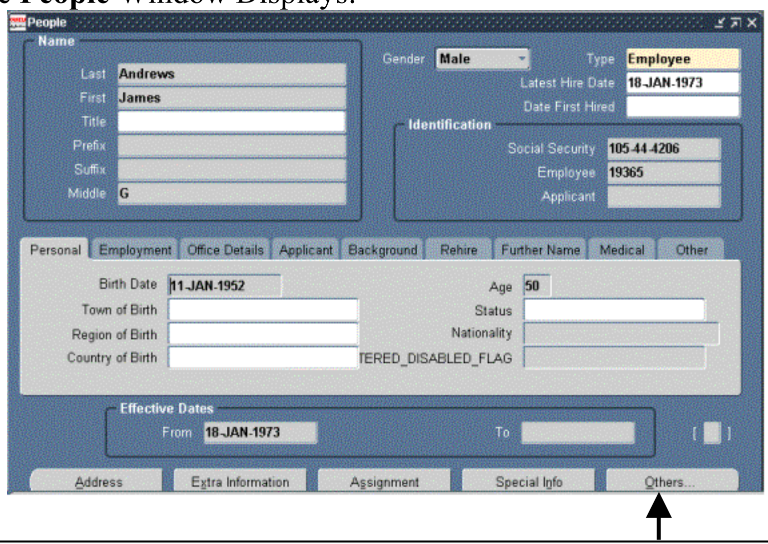
Step	Action
1	On the **Navigator** Window, double click **People → Enter and Maintain.** The **Find Person** Window displays. (For examples, refer to **Accessing the People Window** in this guide.)
2	Click the LOV at the end of the **Full Name** data field.
3	The **People –Find** Window displays. • Enter a % sign to view all the names in the data base, or • Enter the first letter of the last name with a % sign. For example: "A%" displays all last names starting with an "A."  Click <**Find**>
4	The **People – Find** Window displays with list of names and Employee Numbers. Highlight the name and click <**OK**>. 
5	The **Find Person** Window displays with the name and Employee Number:  Click <**Find**>.

Continued on next page

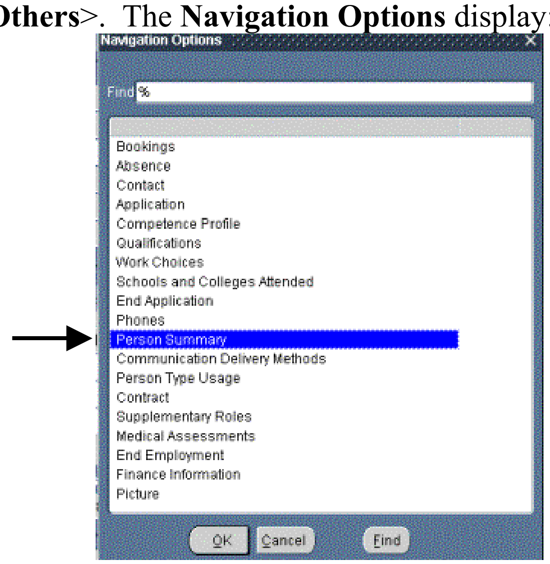
Person Summary, Continued

Accessing the Person Summary (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>The People Window Displays:



</td></tr>
<tr><td>7</td><td>Click <Others>. The Navigation Options display:

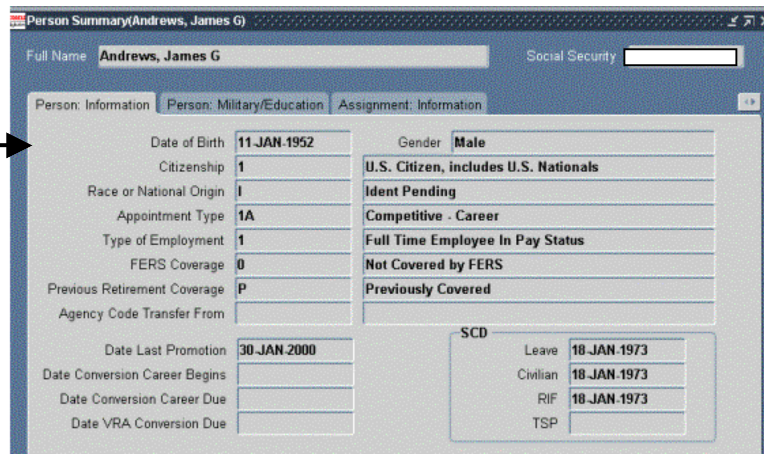


</td></tr>
<tr><td>8</td><td>Select Person Summary and click <OK>.</td></tr>
</table>

Continued on next page

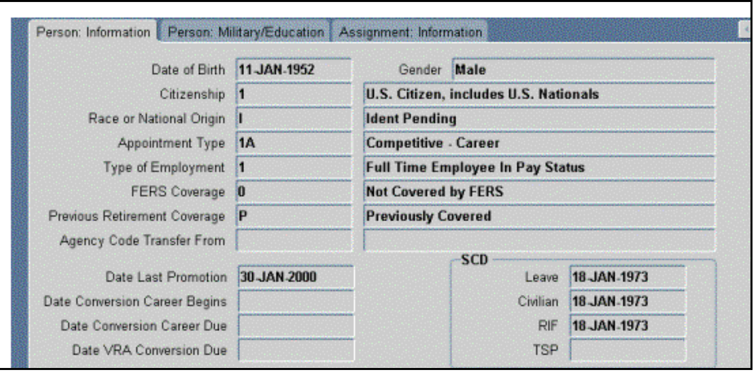
Person Summary, Continued

Accessing the Person Summary (continued)

Step	Action
9	The **Person Summary** displays with three tabs (Person Information, Person: Military/Education, and Assignment Information): 

Person Summary Window Description

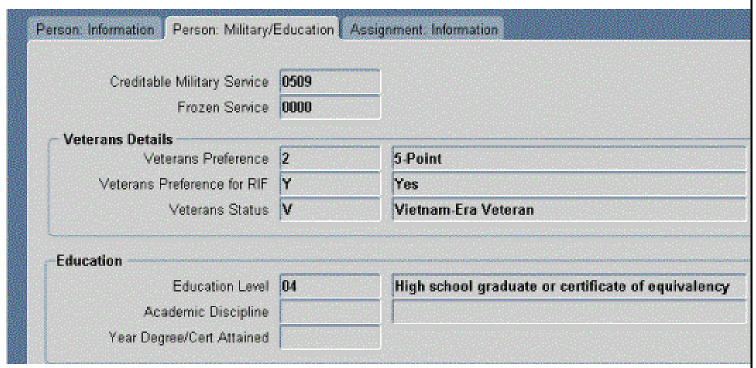
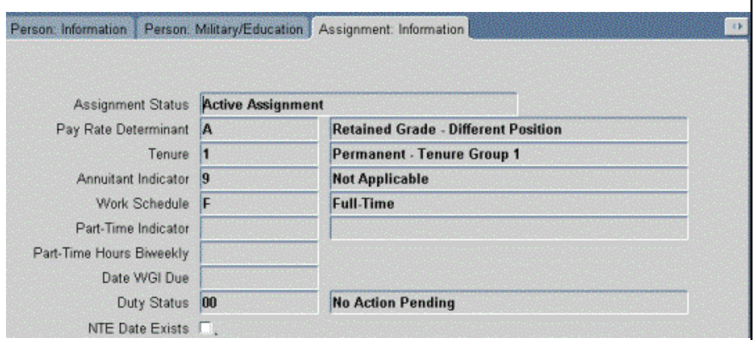
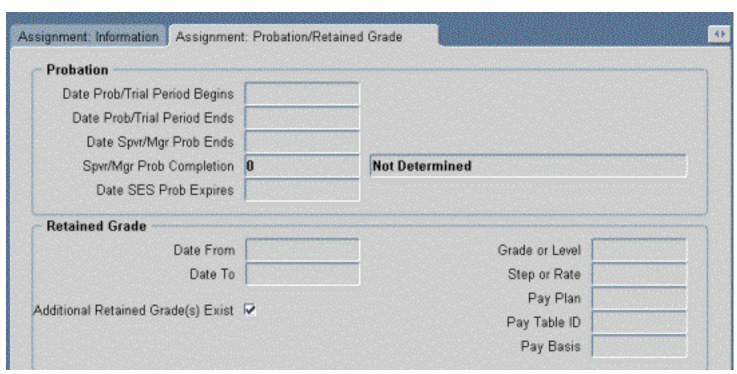
There are 12 tabs on the **Person Summary** Window. Nine more tabs are available when you click the arrows to the right of the tab headings:

Tab	Example/Description
Person Information	

Continued on next page

Person Summary, Continued

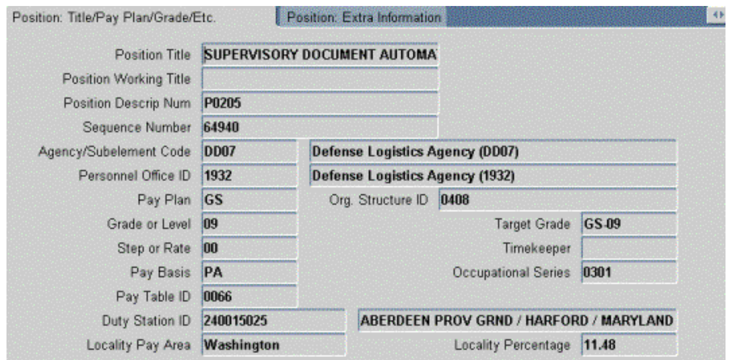
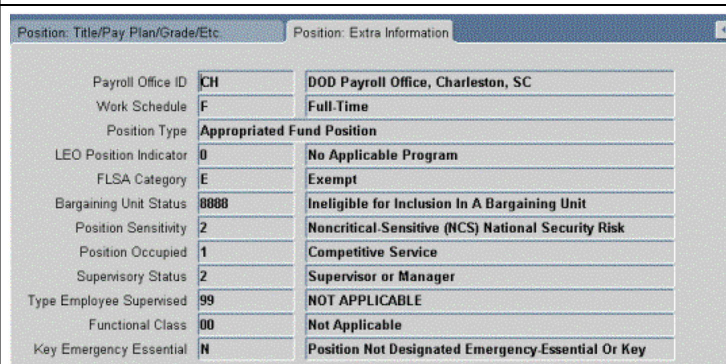
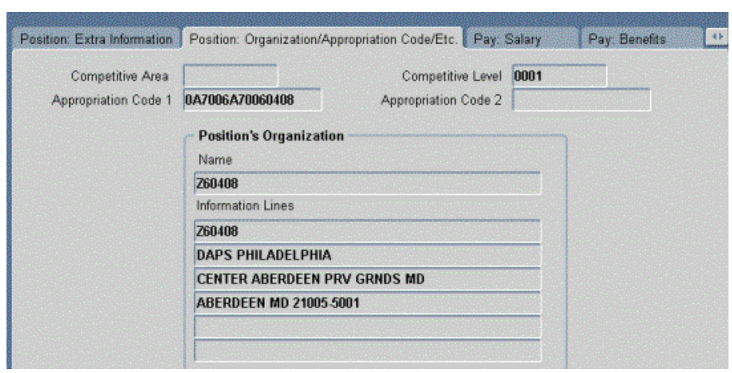
Person Summary Window Description (continued)

Tab	Example/Description
Person Military/ Education	
Assignment Information	
Assignment Probation/ Retained Grade	Click the arrow box to the right to display remaining tabs: 

Continued on next page

Person Summary, Continued

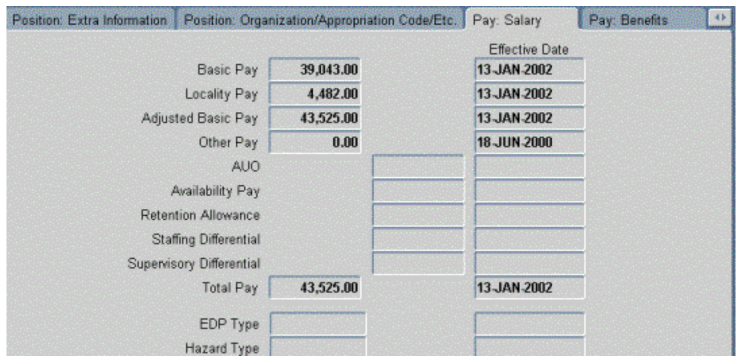
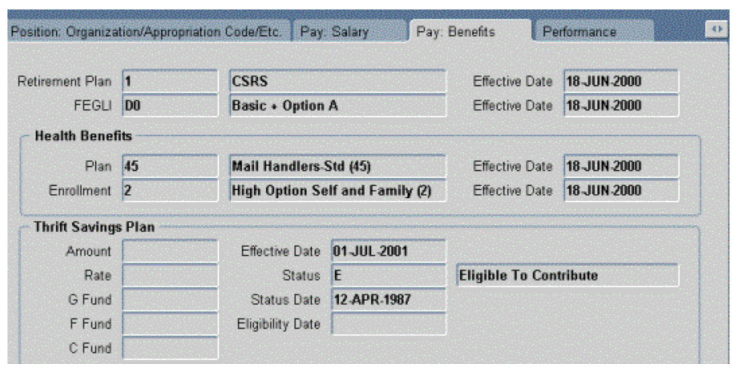
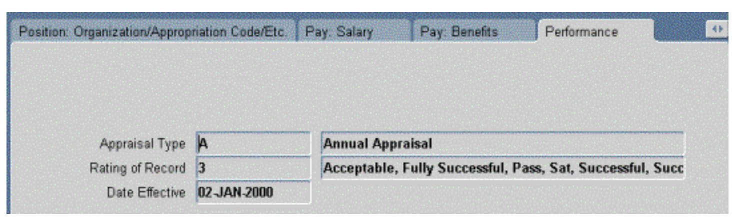
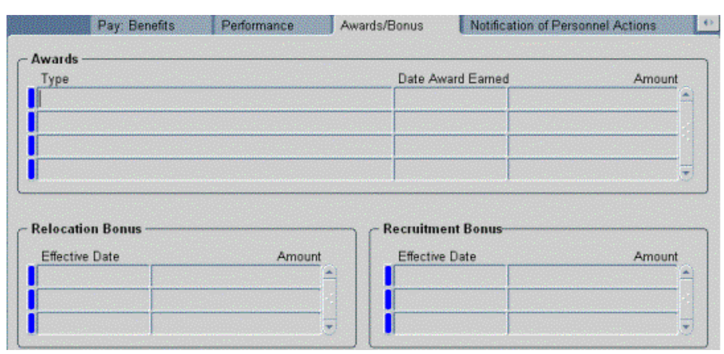
Person Summary Window Description (continued)

Tab	Example/Description
Position: Title/Pay Prev/Grade, Etc.	
Position: Extra Information	
Position: Organization/ Appropriation Code/Etc.:	

Continued on next page

Person Summary, Continued

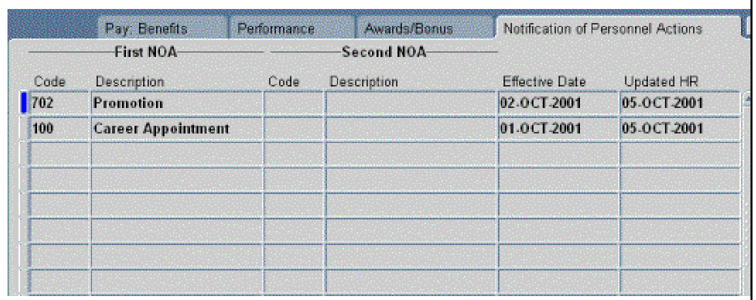
Person Summary Window Description (continued)

Tab	Example/Description
Pay Salary	
Pay Benefits	
Performance	
Awards/Bonus	

Continued on next page

Person Summary, Continued

Person Summary Window Description (continued)

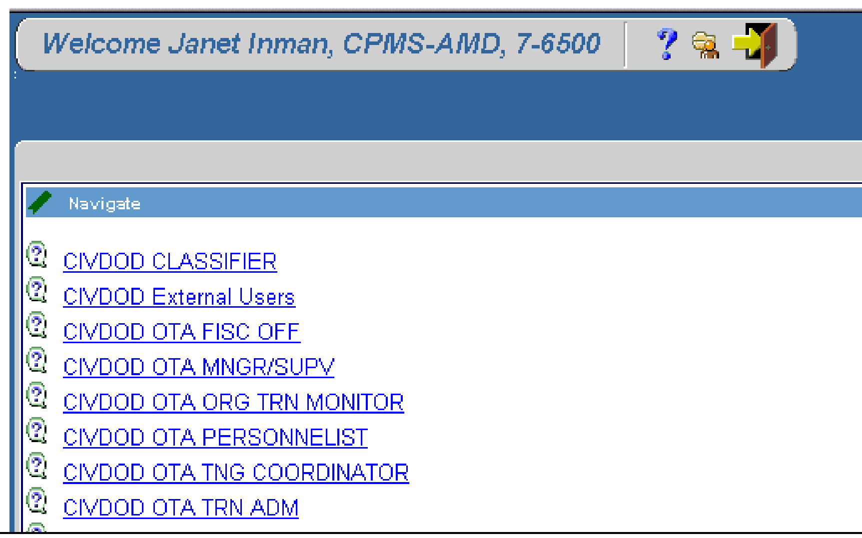
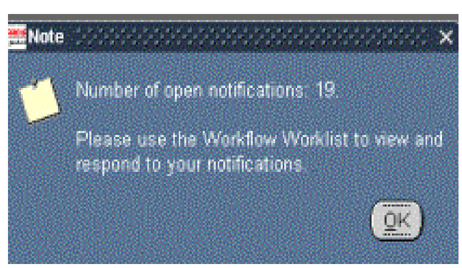
<table>
<tr><th>Tab</th><th>Example/Description</th></tr>
<tr><td>Notification of Personnel Actions</td><td>
</td></tr>
</table>

Oracle Training Administration (OTA)

Purpose

This section shows you how to navigate through OTA.
Note: You must have an OTA Secure User role in order to process actions in OTA.

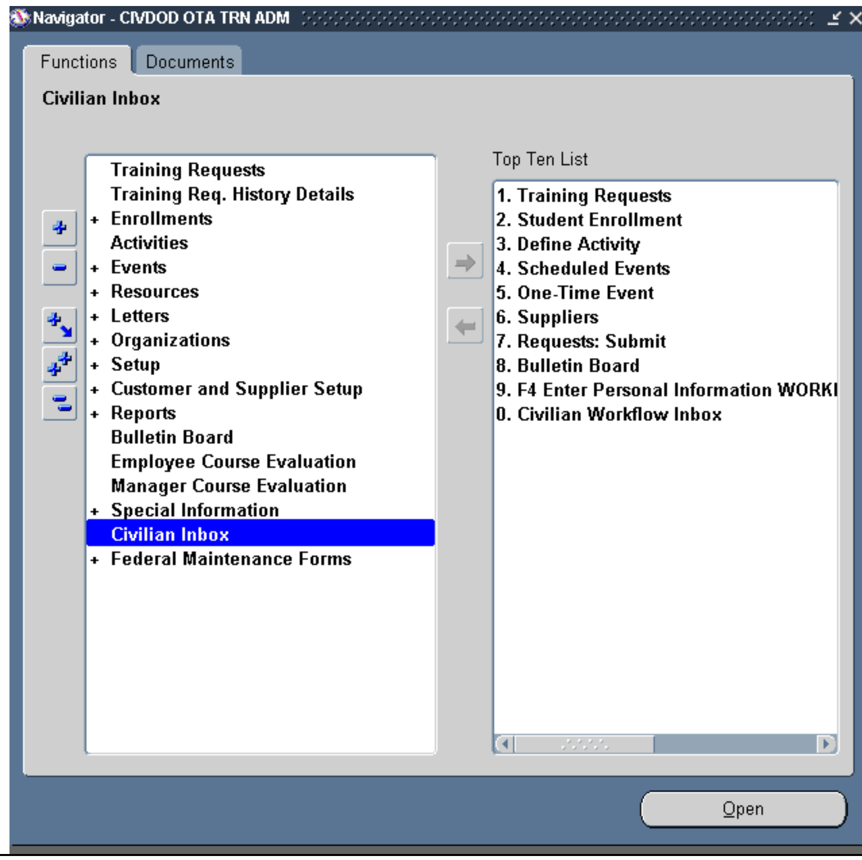
Welcome Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Follow steps 1-4 under Logging In at the beginning of this document.</td></tr>
<tr><td>2</td><td>On the Welcome Window, select one of the six OTA roles, and double click or click <Open>. For example: “CIVDOD OTA PERSONNELIST.”

</td></tr>
<tr><td>3</td><td>If you have actions in your inbox, a notification displays:


Click <OK>. Refer to the Civilian Inbox section in this guide to work these actions after you open the Navigation List.</td></tr>
</table>

OTA Navigator Window

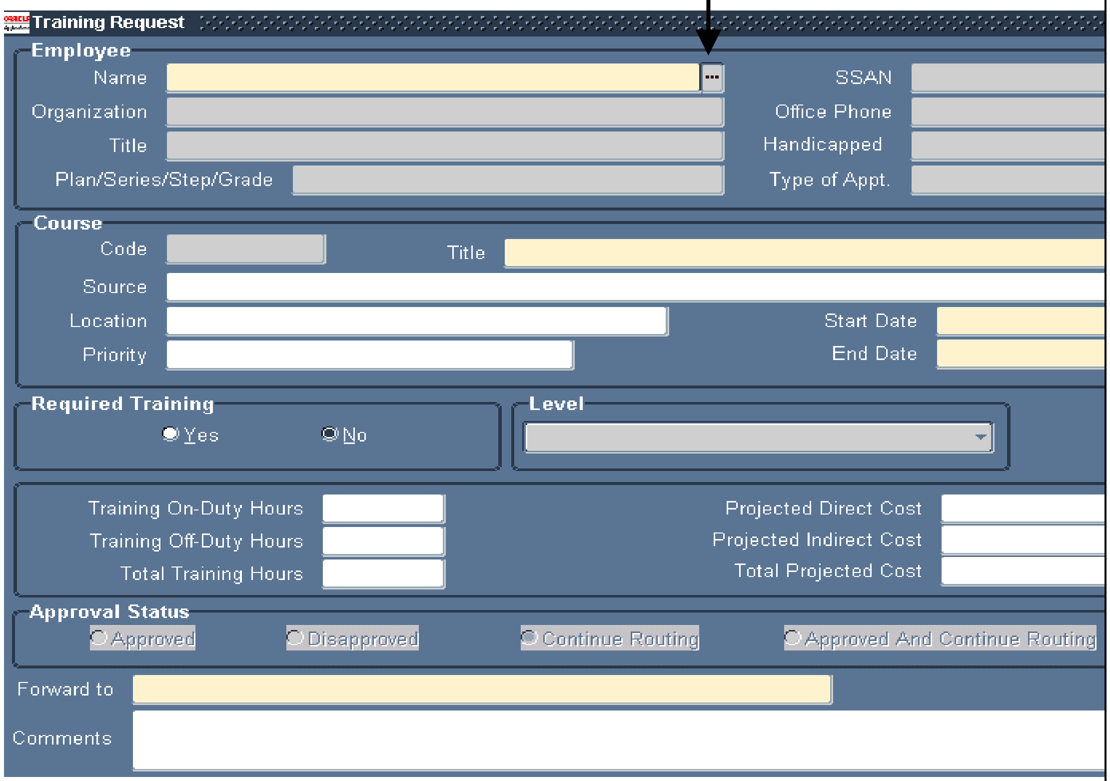
Navigator Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Navigator Window displays with two tabs (Functions and Documents). Documents is not currently used by DoD. The list of functions is the starting point to process training actions:

</td></tr>
<tr><td>2</td><td>You may click on the plus sign to expand the functions and the minus sign to contract them. Double click on the item to start a process, click <Open>, or click the number of the item.</td></tr>
<tr><td>3</td><td>To set up a Top Ten List (displayed in Step 1 above) of your most frequently performed actions, highlight the item on the list and click the middle arrow key to the right.
For example: Highlight Civilian Inbox and click the arrow key. The Top Ten List populates with “10. Civilian Workflow Inbox.”</td></tr>
</table>

OTA – Training Request Form

Completing the Training Request Form (TRF)

Step	Action
1	Select an OTA Responsibility.
2	On the **Navigator** Window → ***Training Requests*** → <**Open**>. The **Training Request** Window displays.



Continued on next page

OTA – Training Request Form, Continued

Completing the Training Request Form (TRF) (continued)

Step	Action	
3	With your cursor in the **Name** data field, click the LOV to select the employee name, remaining region auto populates, and complete the following data fields:	
	Data Field	**Action/Description**
	Title	Click the LOV to select the course (**required**). **Code** auto populates.
	Source	Click the LOV or type in.
	Location	Click the LOV or type in.
	Priority	Click the LOV or type in.
	Start/End Dates	Click the LOV or type in (**Required).**
	Required Training	Under development, currently not linked.
	Level	Select level you are as the initiator of the TRF. Depending on the level, approval and routing buttons are opened or closed.
	Hours	Enter on and off-duty (optional). **Total** auto-populates. (Use **Tab** Key to navigate)
	Cost	Enter dollar amounts (optional). **Total** auto populates. (Use **Tab** Key)
	Approval Status Buttons:	
4	**Forward To** - Click the LOV or type in the name of the person to route the TRF to. This must be someone with an Inbox. You can save the action in your Inbox by routing it to yourself to complete later.	
5	**Comments** - Free flow entry up to 4 lines or 2000 characters	
	Approved and Continue Routing	Normally the first stage. **Note:** You cannot initiate and approve the TRF in the same action, it must be routed
	Continue Routing	Route if you are not the final approver
	Disapproved	Stops the action on the TRF
	Approved	Final action – **no changes may be made once saved.**

Continued on next page

OTA – Training Request Form, Continued

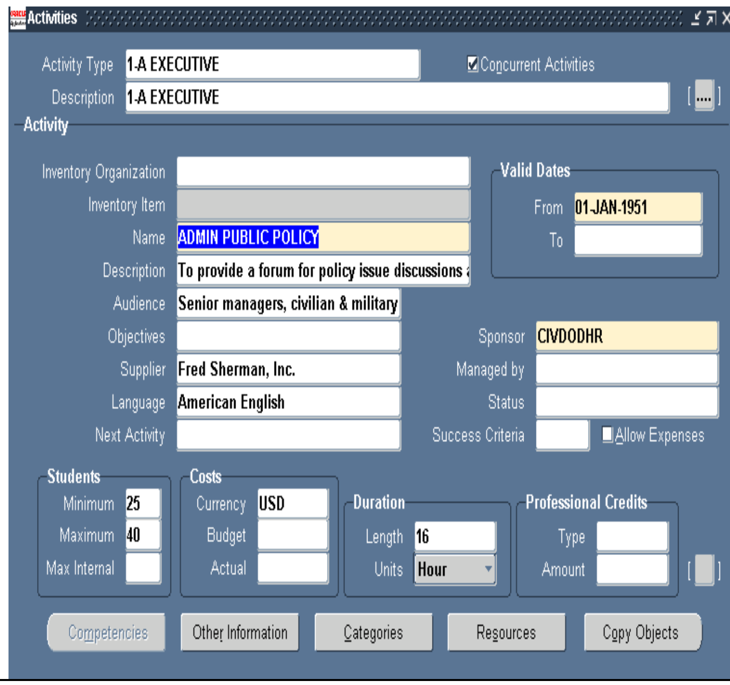
Completing the Training Request Form (TRF) (continued)

Step	Action
6	Click **Save** on the Toolbar. **Notes:** • <**Approved**> or <**Disapproved**> buttons are the final action on the TRF. No further changes can be made. You must route the final TRF to the initiator. • To complete additional TRFs for the same title, select the employee name to populate the **Name** Region then click **Shift+F5** to populate the remaining fields. • Query for completed TRFs by clicking **F11** on the blank name field. • A TRF must be initiated in order to print a DD Form 1556. The TRF populates the person data. It may not be necessary to initiate a TRF for on-site training.

OTA – Defining an Activity

Defining an Activity

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select an OTA Responsibility – TC, TM, OTA Personnelist, or Trng Adm.</td></tr>
<tr><td>2</td><td>On the Navigator Window → Activities → <Open>.</td></tr>
<tr><td>3</td><td>The Activities Window displays.



</td></tr>
<tr><td>4</td><td>Query in the Activity Type data field (F11) for the OPM Course Types to display. Use the ↑ or ↓ keys on the keyboard to tab though the activity types.

Note: These Activity Types cannot be modified by the User.</td></tr>
<tr><td>5</td><td>Associated Activity names and descriptions display in the Activity Region. Use the ↑ or ↓ keys to tab though the activity names. If you do not locate an activity that meets your needs, you need to “define” a local activity using your Component’s naming conventions.</td></tr>
</table>

Continued on next page

OTA – Defining an Activity, Continued

Defining an Activity (continued)

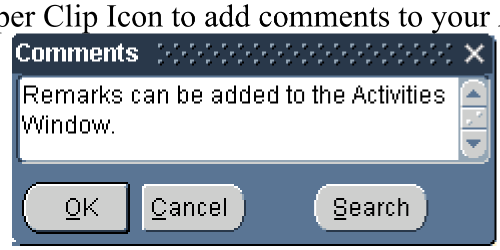
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>In the Activity Region, with your cursor in the Name data field, click the New Record button (green cross) and complete the following data fields:
<table>
<tr><th>Data Field</th><th>Action/Description</th></tr>
<tr><td>Name</td><td>Type in (up to 60 characters)</td></tr>
<tr><td>Name Description</td><td>Type in (up to 2000 characters)</td></tr>
<tr><td>Valid Dates</td><td>Auto populates the start (From) date. The To Date should be entered when you no longer want to use the Activity.
NOTE: You can use a local activity endless times so use “To” dates sparingly.</td></tr>
<tr><td>Audience</td><td>Type in (up to 2000 characters)</td></tr>
<tr><td>Objectives</td><td>Type in (up to 2000 characters)</td></tr>
<tr><td>Supplier</td><td>Click the LOV to make a selection. If the correct one is not available, you need to create a Local Supplier</td></tr>
<tr><td>Sponsor Org</td><td>Populates but you can override by clicking the LOV and selecting the correct UIC or PAS.</td></tr>
<tr><td>Language</td><td>Defaults to American English</td></tr>
<tr><td>Managed By</td><td>Select your name or the course registrar from the LOV.</td></tr>
<tr><td>Next Activity</td><td>Use to identify the successor activity after the current activity has been end-dated. (Optional)</td></tr>
<tr><td>Status, Success Criteria, Allow Expenses Checkbox</td><td>Not Used.</td></tr>
<tr><td>Students and Costs Regions</td><td>Optional use.</td></tr>
<tr><td>Duration Region: Length and Units</td><td>Must input partial hours in order to populate on the Scheduled Event.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

OTA – Defining an Activity, Continued

Defining an Activity (continued)

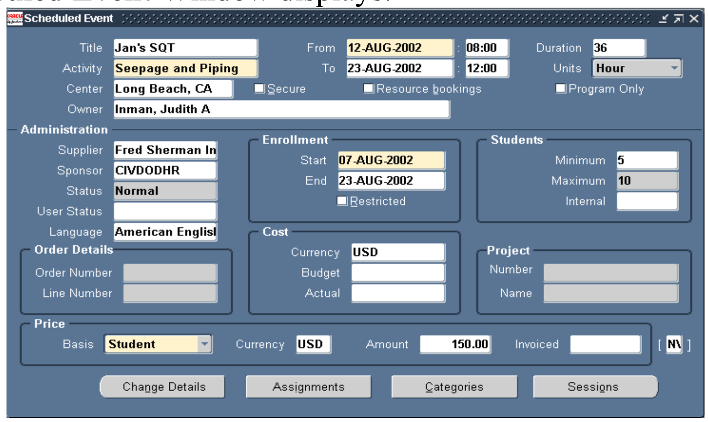
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6
Cont'd</td><td>
<table>
<tr><th>Data Field</th><th>Action/Description</th></tr>
<tr><td>Professional Credits</td><td>Add choices using Local Codes used. DDFs on Activities are currently for optional use by each Component.</td></tr>
<tr><td colspan="2">Taskflow Buttons:</td></tr>
<tr><td><Skills></td><td>Not currently developed.</td></tr>
<tr><td><Categories></td><td>Not currently developed.</td></tr>
<tr><td><Resources></td><td>See Building and Booking Resources.</td></tr>
<tr><td><Copy Objects></td><td>Use when building a second activity to copy data fields from an existing one.</td></tr>
</table>
</td></tr>
<tr><td>7</td><td>Save your action.

Note: Use the Paper Clip Icon to add comments to your Activity.


</td></tr>
</table>

OTA – Scheduling an Event

Scheduling an Event

Step	Action
1	Select an OTA Responsibility.
2	On the **Navigator** Window → ***Events*** → ***Scheduled*** → <**Open**>.
3	The **Scheduled Event** Window displays: 
4	Complete the following data fields:

Data Field	Action/Description
Title	(80 character field) **Note:** Each Region should establish naming conventions.
Activity	Click the LOV to select, including local ones.
Center	Click the LOV to select, including local ones.
Secure Checkbox	Click if you want to limit enrollments
From	Start date of the event; time of day is optional. **Note:** You cannot back date.
To	End date of class
Resource Bookings Checkbox	Optional, click if you have booked resources for this event.
Duration/Unit	Populates from **Activity**, but you can override.

Continued on next page

OTA – Scheduling an Event, Continued

Scheduling an Event (continued)

Step	Action
4 Cont'd	

Data Field	Action/Description
Program only checkbox	Not used at this time.
Supplier	Pops from **Activity** but you can override.
Sponsor	Populates from **Activity.**
Status	Defaults to Normal.
User Status	Not Used.
Language	Populates from **Activity.**
Restricted Checkbox	Optional. See <**Assignments**> below.
Enrollment	Enter **Dates** when enrollments can be accepted
Minimum/Maximum	Populates from **Activity.** **Note:** The Event is set to "Full" when the maximum is reached.
Internal	Optional. Use to limit number who can attend from one organization.
Cost Region	Populates from **Activity** – can override.
Price Region	Defaults to student, or select "No Charge" if funding is not involved.
Currency	Defaults to USD.
Amount/Invoiced	Populates from DDF (See example below)
DDF (Use **Tab** Key to Navigate):	
Agency Group	Use the LOV or type in agency sponsoring the **Event** (**required**) –
Method	Use the LOV or type in. (**required**)
Training Source	Use the LOV or type in (**required**)
Type (AF/AR/NV)	**Required** – query, i.e.; %NV-% for Navy
Tuition Per Student	Type in, (may vary by student), or type "0" if none, so system will provide Totals.

Continued on next page

OTA – Scheduling an Event, Continued

Scheduling an Event (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
Cont'd</td><td>
<table>
<tr><th>Data Field</th><th>Action/Description</th></tr>
<tr><td>Books/Material/Fees</td><td>Type in dollar amount or "0"</td></tr>
<tr><td>Total Direct Cost</td><td>System totals.</td></tr>
<tr><td>Total Indirect Cost</td><td>Always type in "0". This is input on Enrollment Details.</td></tr>
<tr><td>Total Event Cost</td><td>System totals amount.</td></tr>
<tr><td>Billing Organization</td><td>Type in – can add email address here.</td></tr>
<tr><td>Street/City/State/Zip/ Attn:/Phone</td><td>Type in.</td></tr>
<tr><td>Additional Event Information</td><td>Used by WHS and AF.</td></tr>
</table>
</td></tr>
<tr><td></td><td>
Notes: There is no limit on the number of Events you can schedule for an Activity.

To schedule the same Event with different dates, etc.:

Click the New Record Button on the Toolbar and press Shift+F5 to populate all data fields except the DDF.
Input new dates or Center as needed.
You can also retrieve the Event and make changes on it.

To change the number of students or the Event Status:

Click <Change Status> and complete the Event Status Change Window.
Click F11 to refresh.

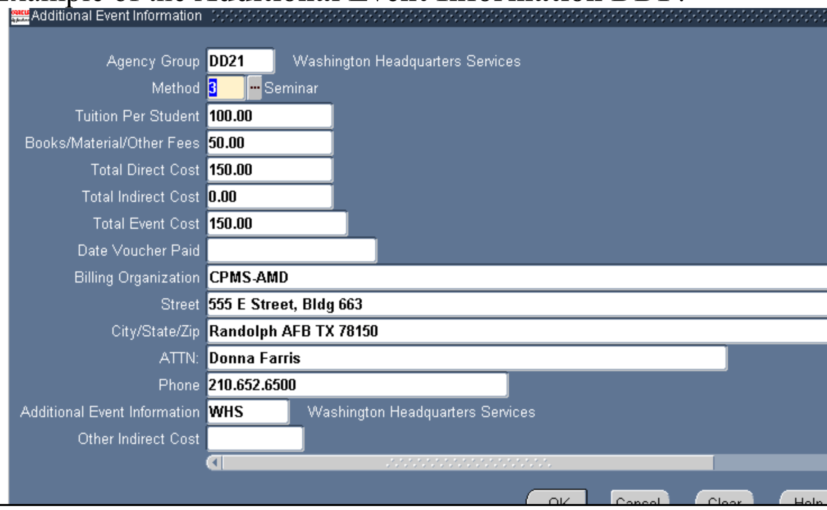
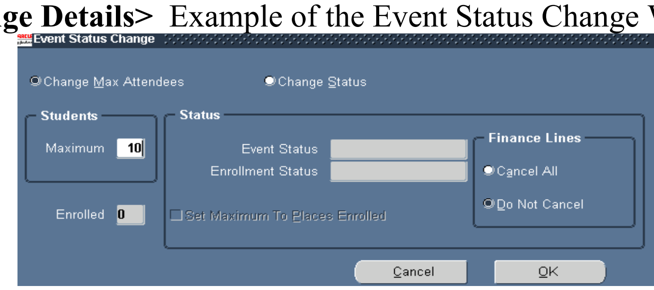
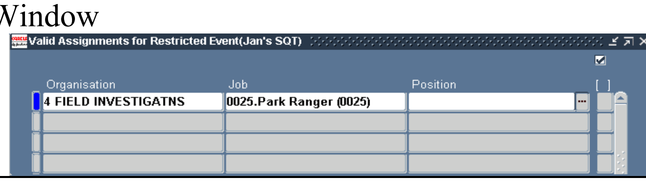
To restrict attendees by organization or job, click <Assignments>.
To populate partial hours, enter them on the Activity first.
To set up specific "sessions" within the Scheduled Event, click <Sessions>.
To further define Activities, click <Categories> which can be used by career programs, etc.

</td></tr>
</table>

Continued on next page

OTA – Scheduling an Event, Continued

Scheduling an Event – Examples (continued)

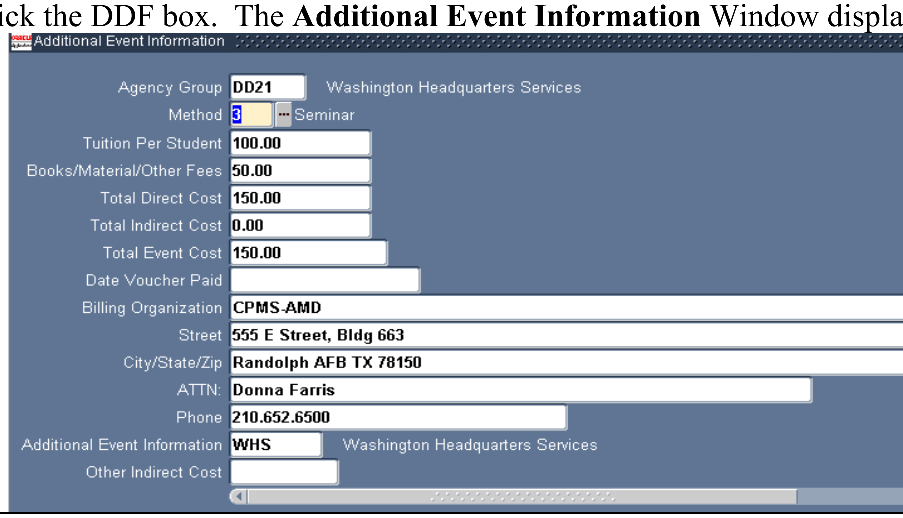
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
Cont'd</td><td>Example of the Additional Event Information DDF:

</td></tr>
<tr><td></td><td><Change Details> Example of the Event Status Change Window:

</td></tr>
<tr><td></td><td><Assignments> -Example of Valid Assignments for Restricted Event Window

</td></tr>
<tr><td></td><td><Sessions> - Example of Event Sessions Window:

</td></tr>
</table>

OTA - Creating a One-Time Event

Creating the One-Time-Event Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select an OTA Responsibility.</td></tr>
<tr><td>2</td><td>On the Navigator Window → Events → One-Time → <Open>.
The One-Time Event Window displays.

</td></tr>
<tr><td>3</td><td>Complete the following data fields:
<table>
<tr><th>Data Field</th><th>Action/Description</th></tr>
<tr><td>Title</td><td>Type in the title using the same naming conventions you used in Scheduling an Event.</td></tr>
<tr><td>Center</td><td>Click the LOV to select or type in.</td></tr>
<tr><td>Supplier</td><td>Click the LOV to select or type in.</td></tr>
<tr><td>From/To</td><td>Click the LOV to select start/end dates. If a specific hour is used, it must be a 5-digit entry; based on a 24-hour clock, e.g., 08:30</td></tr>
<tr><td>Duration</td><td>Type in the number; defaults to Hour, click the Drop-down menu to change. For partial hours, e.g., 1.5, input times of day first.</td></tr>
</table></td></tr>
<tr><td>4</td><td>Click the DDF box. The Additional Event Information Window displays.

</td></tr>
</table>

Continued on next page

OTA - Creating a One-Time Event, Continued

Creating the One-Time-Event Window (continued)

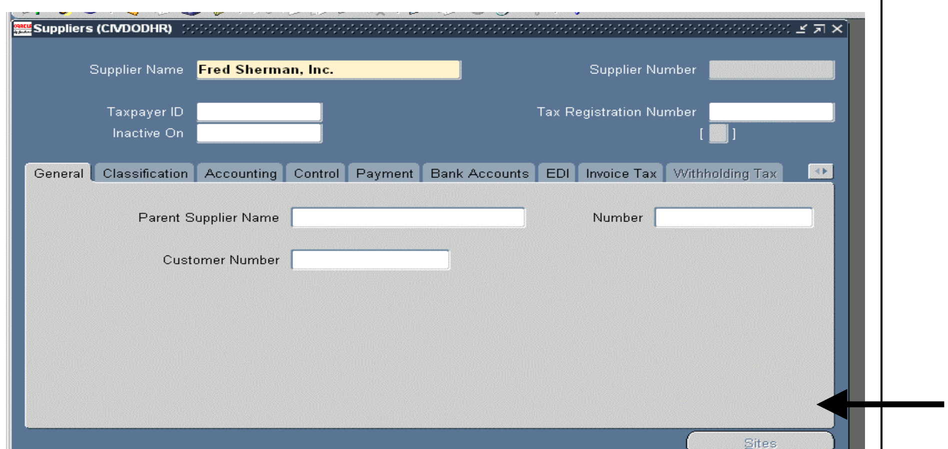
Step	Action
1	Complete the DDF, it is the same one which is on the **Scheduled Event.**
2	Click <**OK**> and **Save** your action.
3	You can now enroll students or notify Training Coordinators/Monitors through the **Bulletin Board**, E-mail, etc., to enroll students in Events allocated. Alerts are currently being developed. **Notes**: • The OTA Trng Adm must turn on **Submit One-Time Event Update HR Report** before this process works. This action is required once at initial deployment or when you are ready to use this process. • Users do not need to build an **Activity** before creating a One-Time Event. • Employees enrolled in **One-Time Events** do not require evaluations. Once their **Event** date ends, completions flow automatically to Oracle HR. • Create additional **One-Time Events** with new times, dates, or centers by clicking the **New Record** Button on the Toolbar and pressing **Shift+F5** to populate each data field except the DDF.

OTA - Creating a Local Supplier

Creating a Local Supplier

This process is only necessary if the supplier is not on the LOV. The DD1556 picks up the location of the training from the **Scheduled Event**. If your vendor provides training at various **Locations**, use Quick Codes to add them to the LOV.

- Components need to establish a specific naming convention before building Suppliers.

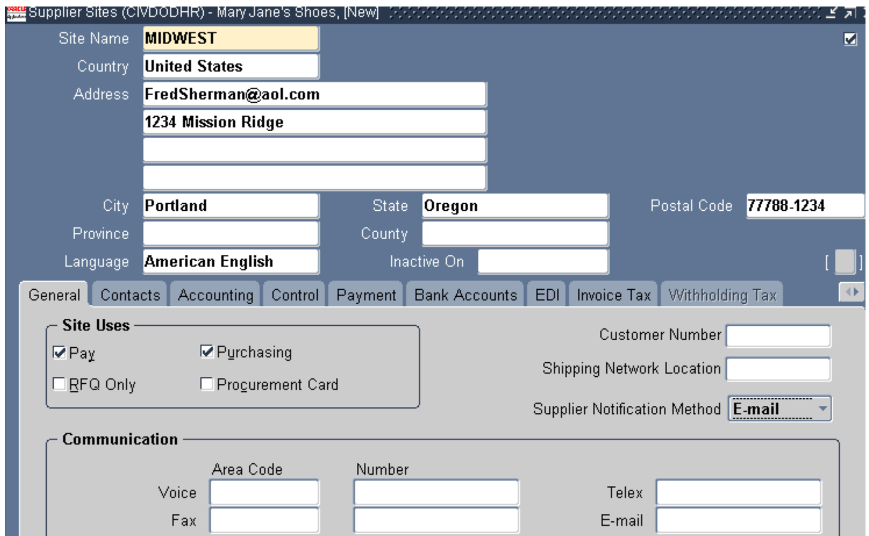
Step	Action
1	Select an OTA Responsibility.
2	On the **Navigator** Window → ***Organizations*** → ***Supplier*** → **<Open>.** The **Suppliers Summary** Window displays. 
3	Query for **Suppliers** by clicking **Ctrl F11**. Tab through the entries with the up and down arrow keys on your keyboard. If you have no **Local Suppliers**, complete the **Supplier Name** data field**.** Click the **<Sites>** taskflow button to add or change address information.

Continued on next page

OTA - Creating a Local Supplier, Continued

Creating a Local Supplier (continued)

Step	Action
4	The **Suppliers Sites** Window displays. Complete the following data fields:



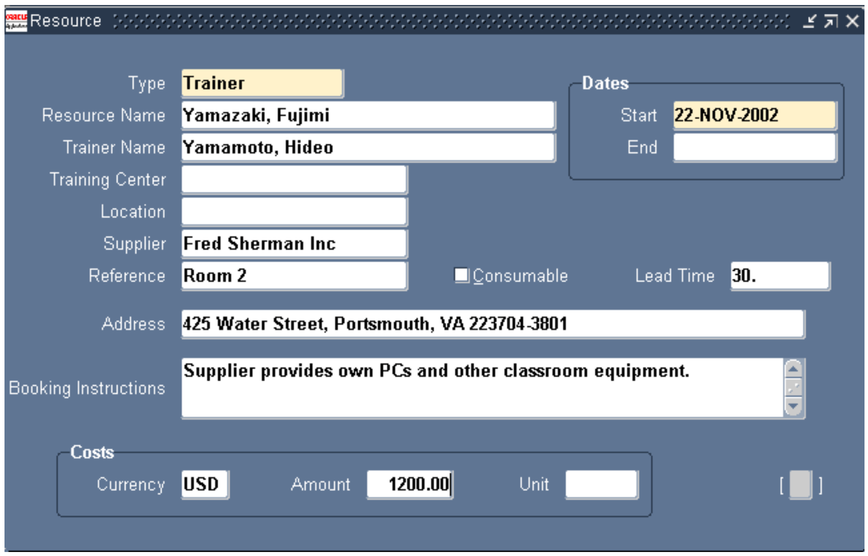
Data Field	Action/Description
Name	Type in location if more than one exists (required but does not populate in the DD1556)
County	Self-explanatory (optional)
Address	Self-explanatory – can add email address here
City	Self-explanatory
State	Self-explanatory
Postal Code	Zip code
Province	Optional
County	Optional
Language	Click the LOV to select
Inactive on	Leave blank if planning to use again

Step	Action
6	Save your action. **Note:** To delete **Suppliers** from your list, you will need to input a date in the ***Inactive On*** data field on the **Supplier Sites** Window and save again.

OTA - Building and Booking Resources

Building a Resource

You need to set up resources before you can associate them with **Activities** and book them for **Events**.

Step	Action
1	You must be in the role of OTA Trng Adm.
2	On the **Navigator** Window → ***Resources*** →***Definitions*** →**<Open>.**
3	The **Resource** Window displays: 
4	Complete the following data fields:

Data Field	Action/Description
Type	Select from the LOV, e.g., Trainer, Venue, other others you can add.
Resource Name	Select from the LOV.
Dates Region:	Populates with today date; leave End Date blank if you plan to reuse.
Trainer Name	Select from the LOV.
Training Center	Select from the LOV.
Location	Select from the LOV.
Supplier	Select from the LOV.
Reference	Free form up to 80 characters.

Continued on next page

OTA - Building and Booking Resources, Continued

Building a Resource (continued)

Step	Action	
4 cont.		
	Data Field	**Action/ Description**
	Consumable Checkbox	Click if the resource is consumed when used, and is not reusable.
	Lead Time	Enter the number of days you must schedule or book the Resource in advance.
	Address	Type in,
	Booking Instructions	Free form.
	Costs Region:	
	Currency	Defaults to USD.
	Amount	Enter Dollar amount.
	Unit	Select from the LOV, e.g., hour, week, etc.
	DDF	Not used at this time – available for customization.
5	Save your action.	

Booking a Resource

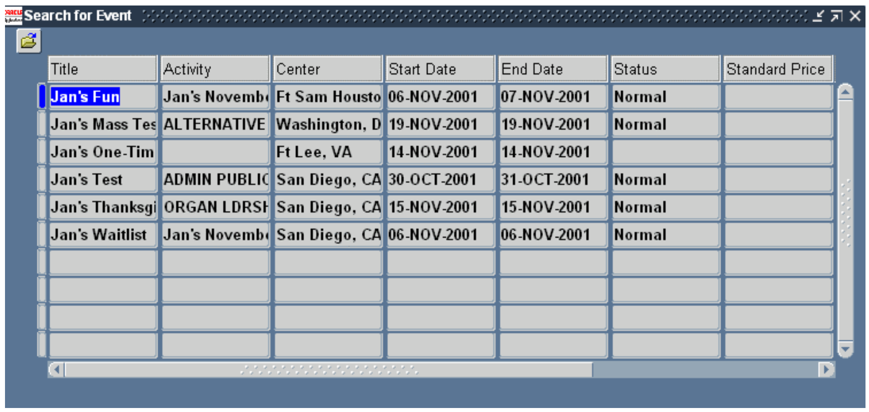
You can book a resource against the **Activity** when you build it or against the **Scheduled Event**. This process will show you how to book it against the **Event.**

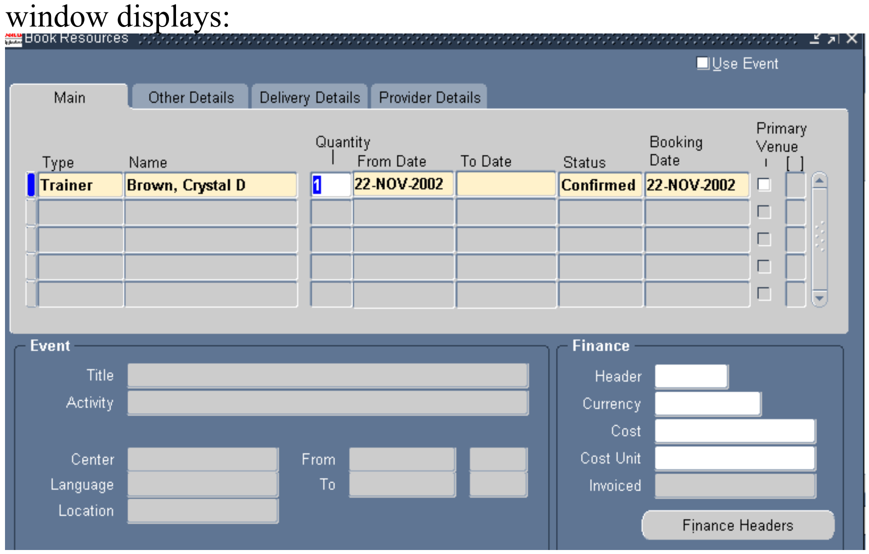
Step	Action
1	Select an OTA Responsibility.
2	On the **Navigator** Window → ***Resources*** →***Bookings*** →**<Open>.**

Continued on next page

OTA - Building and Booking Resources, Continued

Booking a Resource (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The Search for Event Window displays:


</td></tr>
<tr><td>4</td><td>Select the Event, then close the window. The Book Resources window displays:


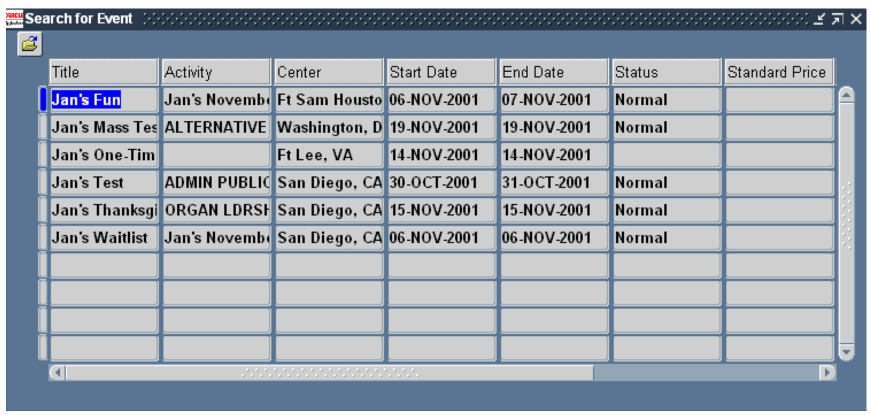
</td></tr>
<tr><td>5</td><td>Clicking the LOV, make selections for Type, Name, Quantity, From Date, Status, and Booking Date.</td></tr>
<tr><td>6</td><td>Save your action.</td></tr>
</table>

OTA - Enrolling an Employee

Enrolling an Employee

This responsibility can be given to Training Monitors or Coordinators, as well as Managers/Supervisors in either a **Scheduled Event** or a **One-Time Event**. **Note:** An **Attendance and Signature Sheet Report** will be available as well as a **Registration Report**.

Step	Action
1	Select an OTA Responsibility.
2	On the **Navigator** Window → ***Enrollments*** → ***Student*** →**<Open>.**
3	The **Search for Event** Window displays. Query for the **Event** you wish to use, select it, and close the window.

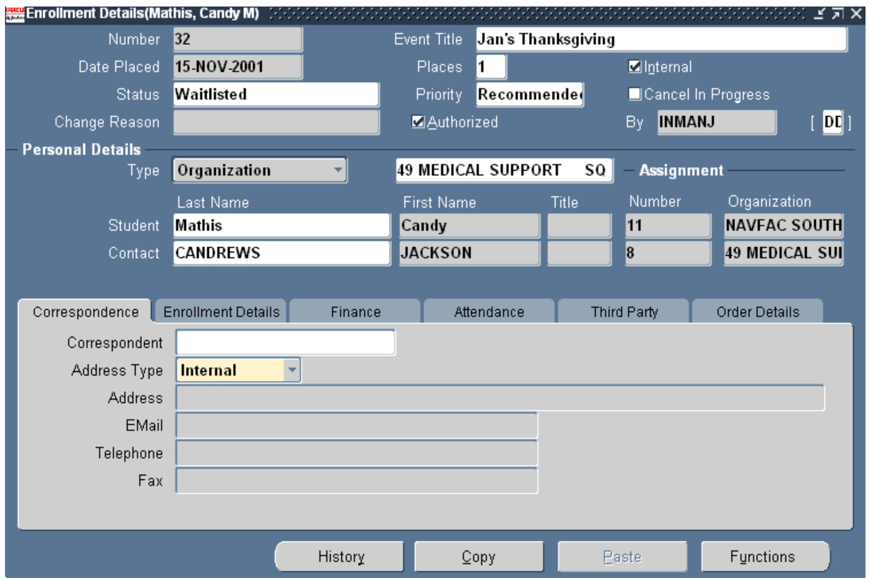


Continued on next page

OTA - Enrolling an Employee, Continued

Enrolling an Employee (continued)

Step	Action
4	The **Enrollment Details** Window displays. Enroll employees/external students by completing the following data fields:



Data Field	Action/Description
Number	Leave blank – system generates when saved.
Date Placed	Populates with today's date.
Status	Click the LOV or type in.
Change Reason	Opens later if you change status.
Event Titles	Populates with **Event** you are using.
Places	Defaults to 1 – not currently used.
Priority	Click the LOV or type in.
Internal Checkbox	Not currently used.
Authorized Checkbox	Optional – click the box, user name populates in the "By" data field.

Continued on next page

OTA - Enrolling an Employee, Continued

Enrolling an Employee (continued)

Step	Action
5	Click the DDF and complete the following data fields:

Data Field	Action/Description
Agency Group	Click the LOV to select Employee's agency (**Required**).
Purpose	Click the LOV (**Required**).
Travel Cost	Type in, may vary by student.
Per Diem or PCS	Type in when needed.
Total Indiv Indirect Cost	System totals.
Tuition Per Student	Type in or input "0".
Books/Materials/Other Fees	Type in or input "0".
Total Indiv Direct Cost	System totals when saved.
Total Indiv Cost	System totals when saved.
Funding Source	Click the LOV (**Required**).
Decision Source	Click the LOV (**Required**).
Training On-Duty Hours	Type in (**Required**).
Accounting Classification	Type in (120 characters) if needed to print on DD1556 or SF182.
Additional Enrollment Info	Click on the LOV and select AF/NV or WHS.
Billing UIC	NV only (**Required**).

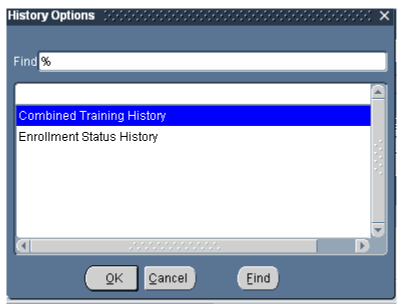
Step	Action
6	Click **<OK>** and return to the **Enrollment Details** Window to complete the following data fields:

Data Field	Action/Description
Organization Assignment	Click the LOV or query for employee's organization.
Student	Click the LOV or type in student's name.
Contact	Click the LOV or type in the name of person who receives the Employee Evaluation (**Required**).

Continued on next page

OTA - Enrolling an Employee, Continued

Enrolling an Employee (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>The Correspondence drop-down menu is optional at this time. In future it will send Selection notifications, etc.</td></tr>
<tr><td>8</td><td>Save your action. Your student is enrolled. Click the following taskflow buttons for additional actions/information:</td></tr>
<tr><td>9</td><td>
<table>
<tr><th>Taskflow Buttons</th><th>Action/Description</th></tr>
<tr><td><History>

</td><td>Provides a window with two choices:
Combined Training History - provides history of training employee has completed through OTA
Enrollment Status History –Not currently used.</td></tr>
<tr><td><Copy> and <Paste></td><td>To enroll additional students, click <Copy>, click new record button (green plus), then click <Paste). The Enrollment Window populates. You will need to complete the DDF, then change the Student name to the new one you are enrolling.</td></tr>
<tr><td><Functions></td><td>You can toggle back to the Search for Event Window or to Enrollment Summary Window to check enrollments. Click F8 (Refresh) to put the names in alpha order. Arrow up and down to see all enrollments.</td></tr>
</table>
</td></tr>
</table>

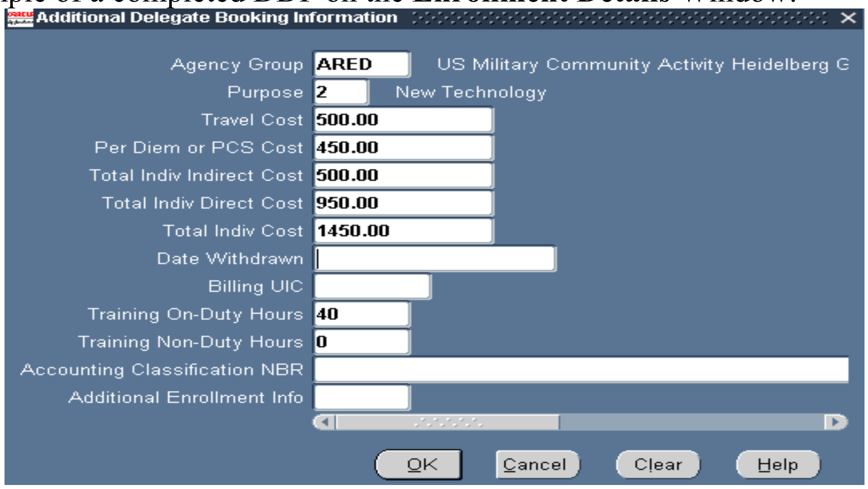
Continued on next page

OTA - Enrolling an Employee, Continued

Enrolling an Employee (continued)

Example

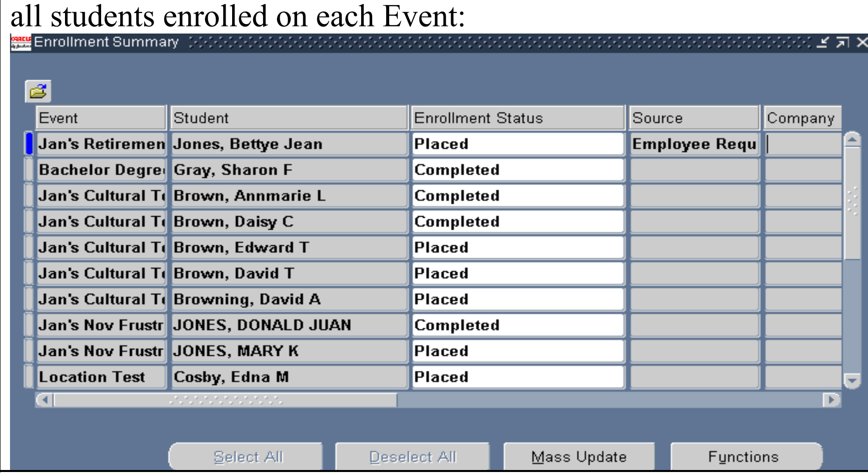
Example of a completed DDF on the **Enrollment Details** Window:



Enrollment Summary

The **Enrollment Summary** on the main menu gives you the capability to review all **Events** and all enrollments in each **Event** at the same time. Use the **Folder Tools** to manipulate the columns and data needed.

Step	Action
1	Select an OTA responsibility.
2	On the **Navigator** Window → ***Enrollment Summary*** → **<Open>.**
3	The **Enrollment Summary** Window displays with all Events and all students enrolled on each Event:



OTA - Recording Completed Training in HR

Recording Completed Training

These steps show you how to enter training completions in the employee record without using the OTA. Otherwise, once training data is entered in OTA, it flows into Oracle HR completed training.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1</td><td colspan="2">Select an OTA Responsibility.</td></tr>
<tr><td>2</td><td colspan="2">On the Navigator Window → People/SITs for Training<Open>.</td></tr>
<tr><td>3</td><td colspan="2">The Find Person Window displays. Query for the employee. The People Window displays. Select Completed Training and complete the following data fields:</td></tr>
<tr><td></td><td>Data Field</td><td>Action/Description</td></tr>
<tr><td></td><td>Course Title (60 characters)</td><td>Use your Component’s naming conventions. (Required)</td></tr>
<tr><td></td><td>Total Course Hours</td><td>Enter total. (Required)</td></tr>
<tr><td></td><td>Class Start Date</td><td>Enter date. (Required)</td></tr>
<tr><td></td><td>Class Graduate Date</td><td>Enter date. (Required)</td></tr>
<tr><td></td><td>Course Grade</td><td>Click the LOV.</td></tr>
<tr><td></td><td>Date Withdrawn</td><td>Use if course incomplete.</td></tr>
<tr><td></td><td>Reason for Withdrawal</td><td>Click the LOV.</td></tr>
<tr><td></td><td>Actual Direct Cost</td><td>Enter dollar amount.</td></tr>
<tr><td></td><td>Actual InDirect Cost</td><td>Enter dollar amount.</td></tr>
<tr><td></td><td>Actual Total Cost</td><td>System totals.</td></tr>
<tr><td></td><td>Funded by Direct</td><td>Click the LOV.</td></tr>
<tr><td></td><td>Funded by Indirect</td><td>Click the LOV.</td></tr>
<tr><td></td><td>Funding Source</td><td>Click the LOV.</td></tr>
<tr><td></td><td>Direct PEC ID (AF use)</td><td>Type in the number.</td></tr>
<tr><td></td><td>InDirect PEC ID (AF use)</td><td>Type in the number.</td></tr>
<tr><td></td><td>Training Source</td><td>Click the LOV. (Required)</td></tr>
<tr><td></td><td>Type -</td><td>Click the LOV and query, i.e.; %NV-% for Navy. (Required for AR/NV/AF)</td></tr>
<tr><td></td><td>Acquisition School Source</td><td>Required for Acq Schools.</td></tr>
<tr><td></td><td>Method</td><td>Click the LOV. (Required)</td></tr>
<tr><td></td><td>Priority Indicator</td><td>Click the LOV.</td></tr>
<tr><td></td><td>Course Code</td><td>Optional use – clear text.</td></tr>
<tr><td></td><td>Decision Source</td><td>Click the LOV. (Required)</td></tr>
<tr><td></td><td>Purpose</td><td>Click the LOV. (Required)</td></tr>
<tr><td></td><td>PCS Cost Indicator (AR use)</td><td>Enter 1 or 2.</td></tr>
<tr><td></td><td>Local Code</td><td>Optional use – clear text.</td></tr>
</table>

Continued on next page

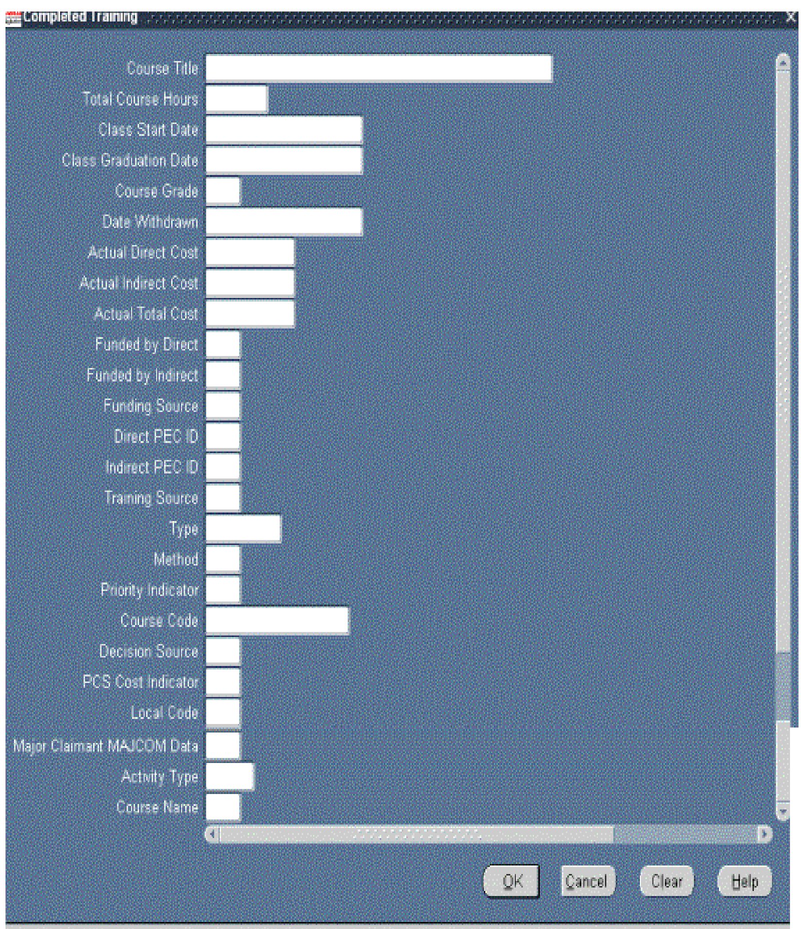
OTA - Recording Completed Training in HR, Continued

Recording Completed Training (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
Cont’d</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><th>Data Field</th><th>Action/Description</th></tr>
<tr><td>Activity Type</td><td>Click the LOV. (Required for non-defense agencies)</td></tr>
<tr><td>Course Name</td><td>Optional use.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click <OK>. Save your action.</td></tr>
</table>

Example

Completed Training Window in HR:

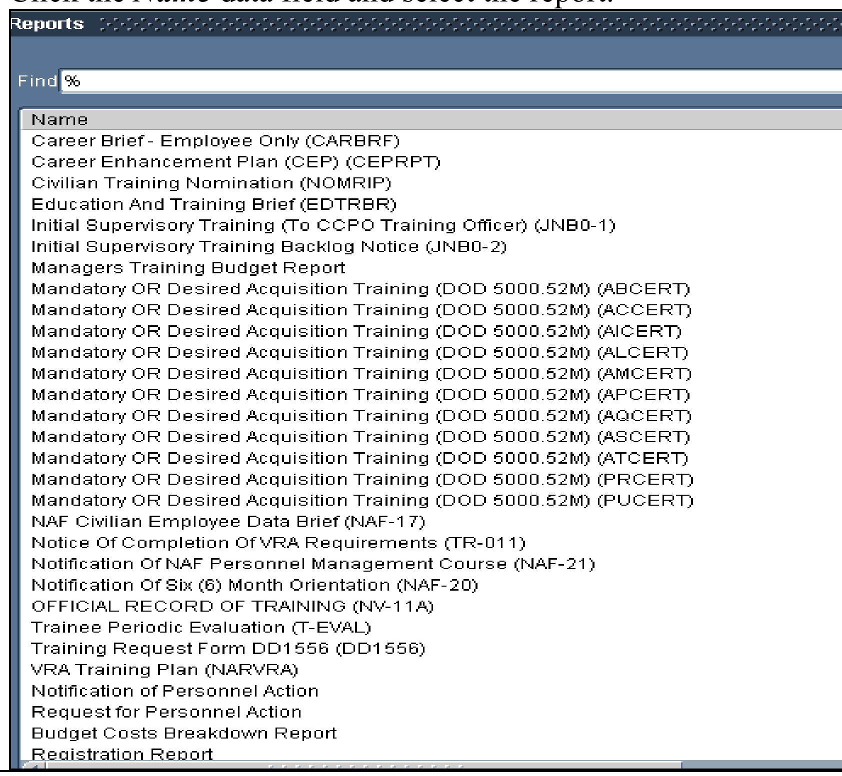


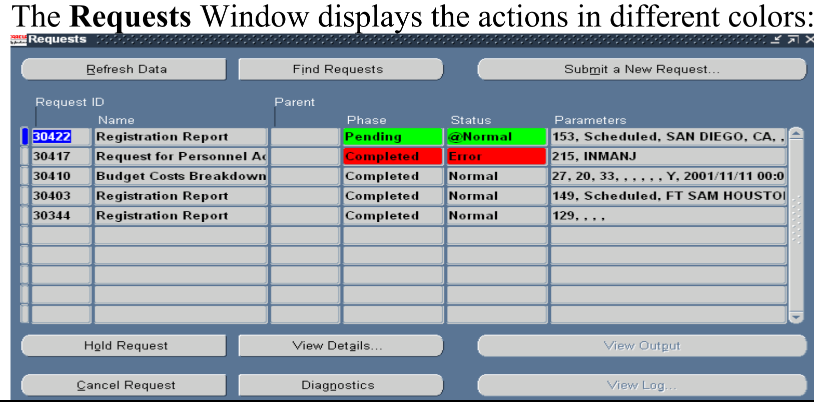
Continued on next page

OTA - Printing a DD Form 1556/SF182 and Other Reports

Printing Reports

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select an OTA Responsibility.</td></tr>
<tr><td>2</td><td>On the Navigator Window → <i>Reports</i> → <i>Submit Report</i> →<Open>. The Submit Requests Window displays</td></tr>
<tr><td>3</td><td>Click the Name data field and select the report.


</td></tr>
<tr><td>4</td><td>The Parameters Window displays. Click the LOV to select the employee name.</td></tr>
<tr><td>5</td><td>The Requests Window displays the actions in different colors:


</td></tr>
</table>

OTA - Setting Up Local Codes

Setting Up Local Codes

Your Component determines the naming conventions and who will be responsible for setting up local codes..

Step	Action
1	Select an OTA Responsibility.
2	On the **Navigator** Window → ***Setup*** → ***Lookup Codes*** →**<Open>.**
3	The **Quick Codes** Window displays. With your cursor in the ***Type*** data field, query for the code you need; i.e., **TRAINING_CENTRE**.
4	Place your cursor on a blank row or click **New Record** Button. Type in the new code. For this example, type in a new training center (location) such as Detroit, Michigan.
5	Complete the ***Description*** data field The effective **From** data auto populates with today's date. Leave the **To** date blank or enter it when you no loner need the entry.
	Example of a **Local Table**: